

**Guidelines and Resources**

# **Pre-Task Planning (PTP) Implementation and Assessment in Construction**

**August 2024**

Authors:

Babak Memarian, PhD, CSP, CHST

Sara Brooks, MPH

Daniel Mehrabi, MS

Jean Christophe Le, MPH

Acknowledgements:

Jerry Rivera, CSP - NECA Washington, DC Chapter

Bill Wright, Jessica Bunting, and Sharretta Benjamin - CPWR

# Implementation and Assessment Guidelines

## Pre-Task Planning (PTP)

### Scope:

Pre-Task Planning (PTP) is a process performed before each task starts to discuss the steps of work, the hazards, and available controls. It helps improve safety, health, and productivity on your jobsite. This comprehensive document includes step-by-step guidelines and applied tools to help construction contractors initiate, assess, and continuously improve their PTP process. This document contains:

- The **Implementation and Assessment Guidelines**, which provide important steps and useful practices to develop an effective PTP.
- The **Sample Completed PTP Form**, which demonstrates how to develop a PTP. This is a sample only and not intended for jobsite use.
- A **Blank Form** to create your PTP.
- The **Post-Task Checklist**, an end-of-shift review tool, which helps you identify issues that came up during the shift and make adjustments for the next day.
- The **Management Assessment Checklist**, which helps the management team assess the quality of the PTP process to ensure it follows recommended practices.
- The **Worker's Perspective Assessment**, which helps contractors assess the quality of their PTP process from workers' perspectives and identify areas for improvement. This assessment can be conducted either by the employer or a third party.

### Disclaimer:

Development of this document was supported with funding from a cooperative agreement between CPWR - The Center for Construction Research and Training (#U60 OH009762) and the National Institute for Occupational Safety and Health (NIOSH). CPWR provides this document at no cost to the user. Please note that this document is not intended as legal advice and is not for the purposes of complying with any federal, state, or local standard or regulation. Content in this document has been developed by CPWR and does not necessarily represent the official views of NIOSH.

Please use the QR code to access the electronic version of this document.



# Table of Contents

<b>Implementation and Assessment Guidelines; Pre-Task Planning (PTP)</b> .....	<b>1</b>
1. Conduct PTP before each task starts .....	1
2. Conduct daily walkthroughs .....	1
3. Involve workers in daily walkthroughs .....	1
4. Update and communicate PTP content when conditions change .....	1
5. Break the task up into manageable steps or sub-tasks .....	2
6. Specify hazards associated with each step of work .....	2
7. Discuss ways to control each hazard .....	2
8. Identify who is responsible for implementing the controls .....	2
9. Inform workers about permit requirements .....	2
10. Discuss hazards posed by other crews working nearby .....	2
11. Give workers the opportunity to lead the PTP meeting .....	3
12. Provide training to conduct or lead the PTP meeting .....	3
13. Gather and incorporate workers' feedback on PTP content and delivery .....	3
14. Use photos or other visual aids instead of text where possible .....	3
15. Use educational aids like a whiteboard or live demonstration .....	4
16. Include supplemental information .....	4
17. Ensure that PTP information is easily accessible to workers after the meeting is completed .....	4
18. Conduct post-task review with your crew to discuss what went well and what didn't .....	4
 <b>Appendix A</b>	
Sample Completed Pre-Task Planning (PTP) Form .....	<b>6</b>
Blank Pre-Task Planning (PTP) Form .....	<b>7</b>
 <b>Appendix B</b>	
Post-Task Checklist: An End-of-Shift Review Tool .....	<b>9</b>
 <b>Appendix C</b>	
Pre-Task Planning (PTP) Assessment: Management Checklist .....	<b>11</b>
 <b>Appendix D</b>	
Pre-Task Planning (PTP) Assessment: Worker's Perspective .....	<b>13</b>

# Implementation and Assessment Guidelines

## Pre-Task Planning (PTP)

These guidelines have been developed based on research findings and input from industry experts to help construction practitioners initiate, assess, and continuously improve their PTP process. **Please note** that this document is not a replacement for your PTP and is not meant to ensure regulatory compliance.



*Please use the QR code to access the electronic version of this document.*

### 1. Conduct PTP before each task starts

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, or other terms. CPWR's Guidelines and Resources for Pre-Task Planning (PTP) Implementation and Assessment help you design, initiate, and assess your PTP process. Rather than focusing on perfection, you should first initiate the process and then continuously identify and address shortcomings and recognize strengths.

### 2. Conduct daily walkthroughs

Site walkthroughs are simple but effective ways to help managers and work crews better understand the current site conditions and identify hazards and challenges to be addressed in PTP. Since workers perform the task and directly interact with challenges and hazards present on the jobsite, it is crucial to involve workers in site walkthroughs and get their input. This also enables workers to share their concerns with management. It is recommended to:

- Conduct jobsite walkthroughs at least once a day.
- Conduct walkthroughs with representatives from management teams and workers of different trades.
- Record (e.g., photograph) hazardous conditions and challenges observed during walkthroughs to address in PTP.

### 3. Involve workers in daily walkthroughs

- Workers should be involved in site walkthroughs, joining the supervisor or safety manager to observe and discuss potential hazards and to offer practical solutions.
- Because workers directly interact with challenges and hazards associated with tasks, their unique perspectives and observations can help highlight potential hazards that might be overlooked in PTP.
- Workers' involvement in this activity also makes them feel valued and engaged, leading to increased buy-in to the PTP process.

### 4. Update and communicate PTP content when conditions change

Conditions on construction jobsites constantly change due to factors such as adjustments to the scope of work, weather, mobilizing major pieces of equipment, or multiple work crews in the same area. PTP content needs to be frequently updated to reflect these emerging hazards and offer proper controls to address them. These changes need to be immediately communicated with work crews. This reduces the risk of accidents or injuries caused by outdated or inaccurate information and fosters a culture of transparency and trust. One way to communicate changes is having huddles after break times or a few minutes of stand-down to explain the new condition.

# Implementation and Assessment Guidelines

## Pre-Task Planning (PTP)

### 5. Break the task up into manageable steps or sub-tasks

Breaking up a task into smaller, more manageable steps makes it easier to identify the hazards associated with each step (see Appendix A). This helps workers better understand the hazards and allows for effective planning and implementation of appropriate controls. Every PTP should focus on one task. Because craft workers perform the task and know its steps and challenges, it is recommended to get their perspective when developing and implementing PTP.

### 6. Specify hazards associated with each step of the task

Identifying, discussing, and addressing the hazards associated with each step of the task helps workers better prepare for challenges they might encounter (see Appendix A).

### 7. Discuss ways to control each hazard

After identifying hazards associated with each step of the task, controls must be put in place to keep workers safe and healthy. As outlined by NIOSH in the hierarchy of controls, the physical elimination of hazards is the most effective way to keep workers safe. When hazard elimination is not feasible, other solutions must be considered and implemented (see Figure 1). Personal protective equipment (PPE) is the last resort for hazard control, so do not rely on it as the primary method.

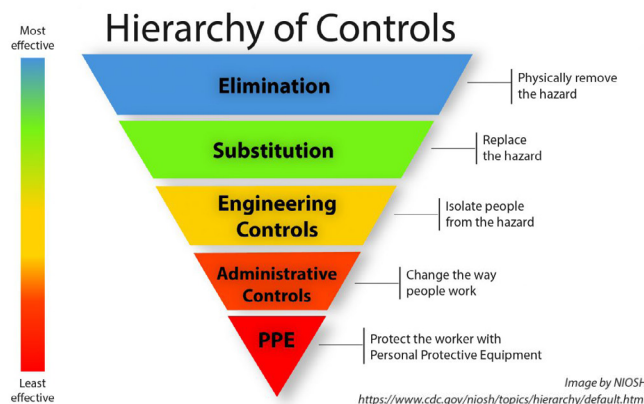


Fig. 1. Hierarchy of Controls

### 8. Identify who is responsible for implementing the controls

Assign specific staff members to implement controls outlined in the PTP. This ensures that they are implemented properly and in a timely manner (see Appendix A).

### 9. Inform workers about permit requirements

Certain construction tasks, such as working in confined spaces or trenching, require obtaining permits before starting work. It is crucial to ensure that workers who are going to perform the task are aware of required permits and their status.

### 10. Discuss hazards posed by other crews working nearby

In addition to the work crew's primary tasks, hazardous conditions can also be caused by other crews working nearby. These hazards and proper controls need to be recognized and discussed with all crew members during the PTP meetings. For example, overhead work can pose hazards to other crews working underneath. Solutions might include rearranging work schedules and adjusting the sequence of activities, setting up safety nets to catch falling objects, or marking a safe perimeter (see Appendix A).

# Implementation and Assessment Guidelines

## Pre-Task Planning (PTP)

### 11. Give workers the opportunity to lead the PTP meeting

PTP meetings are typically led by a supervisor, like the crew foreman. But it is recommended to rotate this role and give the opportunity to conduct these meetings to workers as well. This can create a sense of shared responsibility for safety, enhance engagement, and improve buy-in. However, it is essential to provide proper training to prepare workers as well as supervisors to run these meetings effectively and consistently.

### 12. Provide training to conduct or lead the PTP meeting

Training workers and crew supervisors who lead the PTP meetings is essential to conduct them in a consistent manner. It should focus on presentation skills and encourage meeting leaders to ask essential questions from the crew to encourage worker interaction and engagement. Essential questions include:

- “What is your task today?”
- “What hazards are involved in your work?”
- “What controls are available to protect you from those hazards? Where are they located?”
- “What other crews are working around you and how could their work put you at risk?”
- “Do you have all the tools, materials, and information you need to do your job?”
- “Do you have any questions or concerns?”

It is recommended to:

- Make sure everyone gets the chance to talk.
- Ask practical, scenario-based questions to examine crew members’ understanding of hazards, controls, and site conditions. For example:
  - ◇ “If you noticed overhead work being performed by other crews, what would you do?”
  - ◇ “If you encountered a hazardous condition that was not discussed during the PTP meeting, what would you do?”

### 13. Gather and incorporate workers’ feedback on PTP content and delivery

Gathering workers’ feedback on PTP content helps you understand whether the information is accurate, comprehensive, and relevant. Workers may be able to point out that a potential hazard has not been discussed or that a control is not working as expected. Feedback on delivery can tell you if the content was communicated to workers effectively. Workers may say that they could not hear the meeting leader well, the meeting location was not appropriate, or that they did not have enough time to ask questions. Ways to gather worker feedback include asking directly, providing an anonymous drop box or phone line, and designating a craft worker as a liaison to report issues to management.

It is also essential to incorporate workers’ feedback. It helps improve buy-in, makes workers feel more engaged and empowered, and gives the opportunity for continuous improvement. Because workers perform the task, they encounter all the challenges and hazards and have the most accurate information on task requirements. Incorporating their feedback ensures the information in the PTP is relevant and reflects onsite conditions.

### 14. Use photos or other visual aids instead of text where possible

Replacing text with visual aids - like photos, diagrams, or flowcharts - can help improve workers’ understanding of PTP information. They also help workers with different literacy levels or those with language barriers. Examples include photos showing the correct way to wear PPE, proper use of tools, or site maps showing key locations and other trades.

# Implementation and Assessment Guidelines

## Pre-Task Planning (PTP)

### 15. Use educational aids like a whiteboard or live demonstration

Replacing text-only documents with educational aids like a whiteboard or live demonstration makes your PTP process more interactive and helps workers better understand and retain PTP content. It is also helpful for workers with language barriers or different literacy levels.

### 16. Include supplemental information

Typically, PTP addresses issues related to safety and health. In addition to information related to their immediate tasks, it is recommended to provide supplemental information to give workers a holistic view of the jobsite and the project (see Appendix A). Some examples include:

- a. **Site Layout:** A clear overview of where everything is located on the worksite helps workers navigate the area. Examples include where other trades work, tower cranes' locations, storage areas, and entry/exit points.
- b. **Medical Facility Location and Contact Information:** In case of a medical emergency, having this information available can save time and people's lives. Include the exact location of onsite medical facilities, contact information for safety staff and onsite medical personnel, and the address of the nearest hospital and urgent care facility.
- c. **Evacuation and Emergency Plans:** A comprehensive evacuation plan is crucial for a swift and orderly response to any emergencies onsite. Include clearly marked muster points, exit routes, and procedures for head counts after an evacuation.
- d. **Work Schedule:** Helping workers understand what is going on around them improves awareness of hazards. Include information on the sequence of activities, when other trades will be working nearby, and the start and finish dates of key activities.
- e. **Tools:** Details about tools needed for each task and instructions on how to use them help workers do their job properly. Include a brief description of tools required for each task, their location, and guidelines for inspection and safe use.
- f. **Equipment:** Knowing what equipment will be used onsite can make workers more aware of their surroundings. Include equipment type, location, inspection and operation instructions if applicable, and guidelines for working safely when the equipment is operating nearby.
- g. **Materials:** Details on required materials can help workers perform tasks safely and prevent delays. Provide material storage locations, safe handling instructions, delivery schedule, information on health hazards, and plans for waste disposal or recycling.
- h. **Specific types of PPE:** Specifying PPE needed for a task is essential to adequately protect workers. Include information on the purpose and type of PPE, guidelines on how to use and maintain it, and where it can be obtained on the worksite.

### 17. Ensure that PTP information is easily accessible to workers after the meeting is completed

PTP information needs to be easily accessible to everybody on the jobsite. When needed, workers should be able to go back and review details or instructions to double-check their understanding of task steps, hazards, and safety measures. Some ways to make PTP information accessible after the meeting include posting it on a notice board in a central location, providing handouts, or using a digital document.

### 18. Conduct post-task review with your crew to discuss what went well and what didn't

A post-task review (also known as an end-of-shift review) is a huddle held at the end of the work shift to briefly discuss issues that occurred during the shift, safety and health concerns, and adjustments needed for the next day (see Appendix B). It also reinforces good practices and creates the opportunity for continuous improvement.



# Appendix A

## Pre-Task Planning (PTP) Form





# Pre-Task Planning (PTP) Form

**Project:** Project A  
**Location:** Anytown USA

**Contractor:** Contractor B  
**Name / Role:** J. Doe / Foreman

**Date:** 7/20/2023  
**PTP #:** E1.123

**Task:** Conduit Installation

Steps	Hazards	Controls
Pre-job set up	<ul style="list-style-type: none"> <li>Injury from hand tools and power tools</li> <li>Slips, trips, and falls</li> </ul>	<ul style="list-style-type: none"> <li>Inspect all tools prior to use.</li> <li>Secure the work area and clear bystanders.</li> <li>Use site-specific PPE.</li> <li>Maintain good housekeeping.</li> <li>Complete hands-on training prior to using power tools.</li> <li>Evaluate materials to be drilled for potential hazards (e.g., lead based paint).</li> </ul>
Bend conduit using conduit bender tool 	<ul style="list-style-type: none"> <li>Injury to hands, including pinching fingers</li> <li>Strain/sprain from awkward position</li> </ul>	<ul style="list-style-type: none"> <li>Use site-specific PPE.</li> <li>Keep hands away from bender head.</li> <li>Use proper body positioning when bending conduit.</li> </ul>
Cut conduit with reciprocating saw 	<ul style="list-style-type: none"> <li>Lacerations</li> <li>Metal debris in eyes</li> <li>Strain/sprain from awkward position</li> </ul>	<ul style="list-style-type: none"> <li>Use site-specific PPE.</li> <li>Secure conduit with a vise prior to cutting.</li> <li>Keep hands away from saw blade.</li> <li>Use proper body positioning.</li> </ul>
Drill holes with power drill and install conduit supports 	<ul style="list-style-type: none"> <li>Debris in eyes</li> <li>Lacerations</li> <li>Strain/sprain from awkward position</li> <li>Breathing hazardous dust</li> <li>Noise</li> <li>Burns</li> </ul>	<ul style="list-style-type: none"> <li>Use site-specific PPE.</li> <li>In addition to site-specific PPE, use an N95 mask and hearing protection.</li> <li>Make sure drill bits are sharp and not cracked before use so they don't break off and cause injury.</li> <li>Do not wear loose fitting clothing that can get caught in moving parts.</li> <li>Keep hair and jewelry out of the drill path.</li> <li>Keep hands away from rotating drill bit.</li> <li>Use proper body positioning.</li> <li>After drilling, do not touch the drill bit, it is often extremely hot.</li> </ul>
Drill hole in junction box with power drill	<ul style="list-style-type: none"> <li>Debris in eyes</li> <li>Lacerations</li> <li>Strain/sprain from awkward position</li> <li>Breathing hazardous dust</li> <li>Noise</li> <li>Burns</li> </ul>	<ul style="list-style-type: none"> <li>Use site-specific PPE.</li> <li>In addition to site-specific PPE, use an N95 mask and hearing protection.</li> <li>Do not wear loose fitting clothing that can get caught in moving parts.</li> <li>Keep hair and jewelry out of the drill path.</li> <li>Keep hands away from rotating drill bit.</li> <li>Secure junction box with a vise prior to drilling to prevent rotation.</li> <li>Use proper body positioning.</li> <li>After drilling, do not touch the drill bit, it is often extremely hot.</li> </ul>
Place conduit 	<ul style="list-style-type: none"> <li>Falls</li> <li>Strain/sprain from awkward position</li> <li>Debris in eyes</li> </ul>	<ul style="list-style-type: none"> <li>Use site-specific PPE.</li> <li>If using a ladder, select one of appropriate height.</li> <li>Position the ladder directly beneath work area to avoid over-reaching as this can result in falls.</li> </ul>

**Staff responsible for implementing and checking controls:** R. Garcia

## Crews working nearby:

Crew / Activity	Hazards	Action Plan
Ironworkers / Overhead work	<ul style="list-style-type: none"> <li>Falling objects</li> </ul>	<ul style="list-style-type: none"> <li>Use safety nets.</li> <li>Establish a clearly marked safety perimeter.</li> </ul>
Drywallers / Sanding	<ul style="list-style-type: none"> <li>Silica exposure</li> </ul>	<ul style="list-style-type: none"> <li>Wear a dust mask or N95.</li> </ul>
Laborers / Excavation	<ul style="list-style-type: none"> <li>Cave-ins</li> <li>Falling into excavation</li> </ul>	<ul style="list-style-type: none"> <li>Install barriers or fence off excavation site.</li> <li>Use a spotter when workers are in or near excavation site.</li> </ul>
Operating Engineers / Heavy equipment traffic	<ul style="list-style-type: none"> <li>Struck by</li> </ul>	<ul style="list-style-type: none"> <li>Designate marked pedestrian walkways.</li> </ul>

**Staff responsible for coordinating with other crews:** L. Smith

## Have you provided the information below?

Site layout	Equipment	Specific types of PPE	Medical facility information
Materials	Tools	Work schedule	Permits
			Evacuation and emergency plans

### Notes:

This is sample text.

# Pre-Task Planning (PTP) Form

Your company's logo here

**Project:**

**Contractor:**

**Date:**

**Location:**

**Name / Role:**

**PTP ID #:**

## Task:

Steps	Hazards	Controls

**Staff responsible for implementing and checking controls:**

## Trades working nearby:

Trade / Activity	Hazards	Action Plan

**Staff responsible for coordinating with other trades:**

## Have you provided the information below?

Site layout

Equipment

Specific types of PPE

Medical facility information

Materials

Tools

Work schedule

Permits

Evacuation and emergency plans

**Notes:**

## Appendix B

### Post-Task Checklist: An End-of-Shift Review Tool

# Post-Task Checklist:

## An End-of-Shift Review Tool

A **post-task review** is a huddle held at the end of the work shift to briefly discuss issues that occurred during the shift, including safety and health concerns, and make necessary adjustments for the next day's plan.

Ask each question from your crew and develop an action plan if the status is not satisfactory. **Please note** that this checklist is to complement your Pre-Task Planning (JHA, JSA, pre-job planning, etc.) process and is not a replacement for any other planning steps.



Use the QR code to access the electronic version of this checklist.

**Project:**

**Name / Role:**

**Task:**

**Date:**

No.	Questions	Status		Explanation/Action Items
		Yes	No	
1	Were all tasks completed as planned?			
2	Were there any incidents?			
3	Were there any near misses?			
4	Were all hazards controlled?			
5	Were there any conflicts within the crew?			
6	Did any trades work nearby that you didn't expect?			
7	Did other trades' work cause any challenges or hazards to your crew?			
8	Did you have all the information you needed (e.g., drawings, specifications, etc.)?			
9	Did you have any issues related to PPE?			
10	Were any major pieces of equipment mobilized near your work zone (e.g., tower crane)?			
11	Were there any equipment or tool related issues (e.g., breakdown, unavailability, etc.)?			
12	Were there any material related issues (e.g., quality, delays, etc.)?			
13	Did weather conditions impact your work?			
14	Is there anything else you would like to discuss?			

## Appendix C

### Pre-Task Planning (PTP) Assessment Management Checklist

# Pre-Task Planning (PTP) Assessment Management Checklist



Use the QR code to access the electronic version of this 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.

Name:

Role:

Project:

Date:

1.	Do you conduct PTP before each task starts? ➔ If you answered <b>NO</b> , please use CPWR's PTP Guidelines to initiate your process and then use this checklist to assess it.	Yes	No
2.	Do you conduct daily walkthroughs? ➔ If you answered <b>NO</b> , please skip to <b>question 3</b>	Yes	No
	a. Are workers involved in daily walkthroughs?	Yes	No
3.	Do you update PTP content when conditions change? ➔ If you answered <b>NO</b> , please skip to <b>question 4</b>	Yes	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? ➔ If you answered <b>NO</b> , please skip to <b>question 7</b>	Yes	No
	a. Does your PTP identify who is responsible for implementing the controls?	Yes	No
7.	Do you inform workers about permit requirements during the PTP meeting?	Yes	No
8.	Does your PTP discuss hazards posed by other trades working nearby?	Yes	No
9.	In addition to the crew supervisor, do workers have the opportunity to lead the PTP meeting?	Yes	No
10.	Do you provide any training to conduct or lead the PTP meeting?	Yes	No
11.	Do you gather workers' feedback on PTP content and delivery? ➔ If you answered <b>NO</b> , please skip to <b>question 12</b>	Yes	No
	a. Do you incorporate their feedback?	Yes	No
12.	Does your PTP use photos or other visual aids instead of text where possible?	Yes	No
13.	Do you use educational aids like a whiteboard or live demonstration in your PTP process?	Yes	No
14.	Does your PTP include the following information?		
	a. Site layout	Yes	No
	b. Medical facility information	Yes	No
	c. Evacuation and emergency plans	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
15.	Is PTP information accessible to workers after the meeting is completed?	Yes	No
16.	Do you conduct post-task review with your crew to discuss what went well and what didn't?	Yes	No

## Appendix D

### Pre-Task Planning (PTP) Assessment Worker's Perspective

#### Instructions for Contractors:

The assessment on the following page is for companies that have already started their PTP process and would like to get their workers' perspective on its effectiveness. It should be given anonymously.

If you have not started your PTP process yet, please use CPWR's Guidelines and Resources for Pre-task Planning (PTP) Implementation and Assessment to initiate and then assess your process.



# Pre-Task Planning (PTP) Assessment

## Worker's Perspective

**Instructions:** Your employer would like to learn from your experience in order to identify shortcomings in the Pre-Task Planning (PTP) process and improve its quality. Please answer the questions below based on your experiences on this jobsite. This survey shouldn't take longer than 10 minutes. Please do not provide your name or any personally identifying information.

**Date:**

1. Do you conduct PTP before each task starts?

Yes

No

➔ If you answered **Yes**, skip to **question 2**

Comments:

a. If you answered **No**, when do PTP meetings occur?

When we start a new task

When working conditions change

Other (specify: \_\_\_\_\_)

Comments:

2. How helpful are PTP meetings in doing your job?

(1) Not at all

(2) Slightly

(3) Somewhat

(4) Very

(5) Extremely

Comments:

3. Did your employer train you on how to complete the PTP?

Yes

No

➔ If you answered **NO**, skip to **question 4**

Comments:

a. If you answered **Yes**, how satisfied were you with the quality of the PTP training?

(1) Very Dissatisfied

(2) Dissatisfied

(3) Neutral

(4) Satisfied

(5) Very Satisfied

Comments:

4. Does your employer give craft workers the opportunity to lead PTP meetings?

(1) Never

(2) Rarely

(3) Sometimes

(4) Usually

(5) Always

Comments:

5. Does your employer train employees on how to lead the PTP meeting?

Yes

No

Comments:

6. How satisfied are you with the PTP meeting leaders' presentation skills?

(1) Very Dissatisfied

(2) Dissatisfied

(3) Neutral

(4) Satisfied

(5) Very Satisfied

Comments:

# Pre-Task Planning (PTP) Assessment

## Worker's Perspective

7. How often do you use visual aids like photos or diagrams in your PTP meetings?

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

8. How often do you use educational aids like a whiteboard or live demonstration in your PTP meetings?

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

9. How often is PTP content updated to reflect changes in working conditions?

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

10. How much do you agree with each of the following statements?

Strongly Disagree (1) Disagree (2) Neutral (3) Agree (4) Strongly Agree (5)

a. Each task is broken down into understandable steps in the PTP.

b. The potential hazards for each step of the task are clearly explained in the PTP.

c. Ways to control each hazard are clearly explained in the PTP.

d. PTP content is easy to understand.

e. PTP information is easily accessible after the meeting is completed.

Comments:

11. Are potential hazards caused by other crews discussed in the PTP meetings?

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

12. How often does your employer ask for your feedback on PTP?

➔ If you answered **Never**, skip to next question 13

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

a. Does your employer incorporate your feedback on PTP?

(1) Never (2) Rarely (3) Sometimes (4) Usually (5) Always

Comments:

# Pre-Task Planning (PTP) Assessment

## Worker's Perspective

13. How often does your employer give you information on the following items?

	Never (1)	Rarely (2)	Sometimes (3)	Usually (4)	Always (5)
a. Site layout					
b. Medical facility location					
c. Evacuation and emergency plans					
d. Schedule					
e. Tools					
f. Equipment					
g. Materials					
h. Specific types of PPE					
i. Permits					

Comments:

14. How often does your employer update you when jobsite conditions change?

(1) Never      (2) Rarely      (3) Sometimes      (4) Usually      (5) Always

Comments:

15. How often does your employer conduct site walkthroughs?

➔ If you answered **Never**, skip to **question 16**

(1) Never      (2) Rarely      (3) Sometimes      (4) Usually      (5) Always

Comments:

a. Are worker representatives involved in site walkthroughs?

(1) Never      (2) Rarely      (3) Sometimes      (4) Usually      (5) Always

Comments:

16. Do you have end-of-shift huddles to discuss issues you noticed during the shift?

➔ If you answered **Never**, do not answer the next question.

(1) Never      (2) Rarely      (3) Sometimes      (4) Usually      (5) Always

Comments:

a. How satisfied are you with the end of-shift huddles?

(1) Very Dissatisfied      (2) Dissatisfied      (3) Neutral      (4) Satisfied      (5) Very Satisfied

Comments:

Thanks for your participation!