Planned Task Observations Guideline

WMC-EHS-GUI-003.2

Owner: Martin Webb
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1 PURPOSE AND SCOPE

To observe all steps of a task as it is being carried out to ensure procedures are accurate and being followed. Tasks to be observed shall include critical tasks and those tasks which are performed infrequently.

This procedure covers all tasks done by employees or contractors at all WMC operations.

If a written instruction does not exist for the work being done, a Planned Task Observation may be conducted against the Task Hazard Analysis for the work.

2 DEFINITIONS

Task - A segment of work which requires a set of specific and distinct actions for its completion.

Critical Task - Is a task which, if not done correctly, may result in serious injury, illness, property damage, process loss, environmental impact or other loss.

Task Hazard Analysis - A formal process where each step of a task is analysed and controls are put in place for each hazard identified.

3 COMPETENCIES

Planned Task Observations are to be conducted by personnel who have successfully completed the WMC approved Planned Task Observation training and are deemed to be competent to conduct such observations.

To ensure the Planned Task Observation process is understood and supported, all personnel are to receive information regarding the Planned Task Observation process and benefits it offers. This information must be discussed at each sites general induction and a detailed explanation is to be provided for all work groups.

4 CONDUCTING PLANNED TASK OBSERVATIONS

Formal planned task observations are to be conducted on a regular scheduled basis within each work group.

Each work group is to identify all critical tasks carried out by that work group and a Planned Task Observation is to be conducted for each critical task, at least in every 12 month period.

Over a period of time all of a supervisor’s employees should be observed

Scheduling the observation - to do the planned task observation correctly takes time. It needs to be planned in advance and put into the schedule.

As a guide it may be useful to draw up a matrix of the employees in the section and the tasks that they perform. A matrix block is filled in with the date a person is observed doing the relevant task. This gives a good visual record of which tasks and which workers have been observed including when they were last observed.
5 RECORDING PLANNED TASK OBSERVATIONS

All Planned Task Observations are to be recorded using a form similar to that shown in Appendix A, to provide a record of the audit, to allow future audits to follow up on the items discovered and to ensure that the complete range of tasks and workers are observed.

Accurate records of Planned Task Observations conducted and actions resulting are to be maintained.

6 ACTIONS RESULTING FROM TASK OBSERVATIONS

All actions resulting from Planned Task Observations are to be recorded on the Task Observation form.

All outstanding actions are to be entered into the WMC Resources Environment Health & Safety Data Management System (EHS DMS).

7 SYSTEM REVIEW

A part of the continuous improvement cycle, a review of the Planned Task Observation system is to be carried out at least annually to determine deficiencies which may be present and to allow the required improvements to be made.

Actions resulting from the review shall be recorded in the WMC Resources Environment Health & Safety Data Management System (EHS DMS)

Planned Task Observation process

A Planned Task Observation consists of four stages as follows:

- Stage 1 - Preparation
- Stage 2 – Conducting the Observation
- Stage 3 – Providing feedback
- Stage 4 – Recording the results and actions

Details of each stage are:

7.1 Preparation

Prior to conducting a Planned Task Observation, the following preparation is required.

7.1.1 Identify the task to be observed

Identifying the task to be observed must be decided in advance and should be the result of either an incident follow-up, a task infrequently performed, a scheduled training follow-up or a scheduled critical task observation.
7.1.2 Review existing documentation

Obtain and review a copy of the relevant Safe Work Procedure or in the event that there is no work procedure the relevant Job Safety Analysis and the results of the previous Planned Task Observation for the task.

7.2 Conducting the Observation

7.2.1 Communications Intention to Conduct a Planned Task Observation

The employee carrying out the task that is to be the subject of a Planned Task Observation should be informed in advance that the Observation is to be conducted.

7.2.2 Task Hazard Analysis Review

When observing tasks that only have a THA a determination will be required by the observer as to whether a Safe Work Instruction would be more appropriate and if so, this requirement is to be one of the actions resulting from the observation.

7.2.3 Observing

When conducting a Planned Task Observation there are four key points which the observer must follow:

(a) Be close enough to observe all activities, but do not encroach into the work area or interfere with the work process.

(b) Do not interrupt the work process with questions and suggestions unless preventing an incident from occurring.

(c) Remain alert and look for the little things that may make a big difference. When some aspect of the work process doesn’t fit with what the standard calls for then note this for further action.

(d) Do not let the note taking distract you from the observation process, use key words instead of details.

7.3 Providing Feedback

Whenever possible the observer should provide immediate feedback. If there is not a natural break, find out when you can return to talk to the person carrying out the task.

In the feedback session the observer must at least:

- Thank the person for assisting in the process
- Ask questions and review notes to ensure they have a clear understanding of what was observed
- Discuss and agree on possible changes to the work method or procedure if required and discuss the Planned Task Observation Report
- Recognise and compliment exemplary behaviour.
7.4 Recording Results and Actions

At the completion of a Planned Task Observation the observer is responsible for ensuring the following is carried out:

(a) The outcomes of the observation are discussed with the person being observed and agreement reached on actions to be carried out

(b) The Planned Task Observation Report is completed

(c) Outstanding actions are entered into WMC Resources Environment Health & Safety Data Management System (EHS DMS), following the correct process for action allocation

(d) The Completed Planned Task Observation Report is filed in accordance with WMC document control process
8 APPENDICES

Appendix A  Task Observation Report
APPENDIX A

Task Observation Report

Name of Employee: .............................................................................................................
Department: ......................................................................................................................
Occupation: ......................................................................................................................
Date: ...............................................................................................................................
Type of Observation:  □ Initial  □ Follow up
Time at Site: ...................................................................................................................
Time in present job: ........................................................................................................
Notification:  □ Told in advance  □ Not told in advance
Reason for Observation:
- □ Incident follow up
- □ Training follow up
- □ Critical task audit
- □ Task infrequently performed
Safe work instruction or JSA being observed?:  □ Yes  □ No

Task Observation

Consider the following points and describe clearly any practices or conditions that deserve compliment or correction.

- Could any of the practices observed result in property damage or injury?
- Were the methods and practices observed the most efficient and productive?
- Did the observed practices comply with all applicable standards for the task?
- Could any observed practice have a detrimental effect upon the product quality or the environment?

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Should a follow-up observation of this worker or task be made in the near future?:

☐ Yes  ☐ No

If yes, record details in action plan below

Observer Name: ......................................................................................................................
Title: ......................................................................................................................................
Signature: ..............................................................................................................................
Observer’s Supervisor: ...........................................................................................................
Title: ......................................................................................................................................
Signature: ..............................................................................................................................

**Action Plan**

Describe any follow up actions ie. procedures, methods, training or equipment you observed that should be changed or improved, in the interest of safety, quality, environment or productivity. Describe the actions you have taken to effect these changes. Record these actions below:

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Guideline – Planned Task Observations

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