

CONDUCTING A SUCCESSFUL SITE TOUR


BE ALIGNED TARANAKI



LEADERSHIP VISIBILITY IS A KEY ASPECT OF SAFETY

It is a great opportunity to not only see how work is actually done, versus how we imagine it, but also to build trust with those on site by listening to their issues and taking action where required.

- ▶ Visits to operating sites to review HSSE practices are one of the main ways to be visible. A focussed HSSE walk will allow you to be present onsite, observe work as it is occurring, and have a conversation with the workers.
- ▶ Conversations should include both the HSSE hazards related to the activity they are conducting and also to give them an opportunity to raise any issues.
- ▶ You do not have to have a technical understanding to engage in a curious and authentic way.
- ▶ HSSE Walks can be done at any site or facility, including in the office.



BENEFITS OF A SITE TOUR

Visiting a specific location allows for a better understanding of:

- ▶ the physical working environment that individuals face
- ▶ The work processes in place, and whether they are being followed
- ▶ the people who are knowledgeable about the site
- ▶ The challenges faced, creating hands-on opportunity to learn and improve



MANAGEMENT ENGAGEMENT GUIDE

- ▶ Visit areas where there are potentially higher risks, high levels of activity, or areas that are the “dark corners” of your business.
- ▶ Plan ahead to understand who is onsite, and what work is being undertaken.
- ▶ Make sure the purpose is visibility and clear demonstration of interest – it is not a site inspection or audit.
- ▶ Set the standard – make sure you have the right PPE for the visit, and that you follow all the requirements to get onto the site
- ▶ Engage – consider discussing your “Why” and asking them about their “Why”
- ▶ Ask about the work being conducted:
 - ▶ What is their specific task?
 - ▶ What risks to themselves, others and the environment are associated with what they are doing?
 - ▶ Is there a JHA (or permit and risk assessment) for the task?
 - ▶ What controls do they have in place to address the risks?
- ▶ Listen twice as much as you talk
- ▶ Stay focussed on health, safety and environmental protection

HIGH IMPACT ENGAGEMENTS

A High Impact Engagement is a tool used to observe a work part or activity. It requires stepping back, and taking the time to simply observe and note what is happening

Observe the work area, recognise hazards

- ▶ Step back and look together. The more you look, the more you see. More eyes see more.
- ▶ Scan systematically, follow your instincts. Focus on safety first. Intervene immediately if you feel the activity needs to be stopped.

Ask questions to the work party

- ▶ Consider the credible consequences, and the domino effect (what-if).
- ▶ Make it real, credible.
- ▶ Build rapport, then ask "Do you see anything that isn't quite right?"
- ▶ Question together, understand the situation.
- ▶ Socratic learning – intervention through questioning.

Be open to feedback

- ▶ Understand how the situation has occurred and jointly agree actions to resolve if necessary.
- ▶ Fix immediately where possible, recognise positives.
- ▶ Ask them to share the conversation with their work party colleagues.

OBSERVATION TIPS

- ▶ **Hazards** – recognised, risk assessed, controls in place
- ▶ **Health** – noise, ventilation, fumes, biological, heat, fit to work
- ▶ **Environment** – chemicals, waste, exhaust, resource efficiency
- ▶ **Contractors** – managed, involved with meetings, risk assessments in place, trained
- ▶ **Resources** – sufficient, appropriate, maintained, competent
- ▶ **Supervision** – present, aware, respected, knowledgeable, effective
- ▶ **Systems** – permit to work, work at height, confined space, lifting etc
- ▶ **Tools & Equipment** – condition, suitable for task, pre-start inspections, tested & tagged



OPEN ENDED QUESTIONS TO ENGAGE:

Leaders

What recent health, safety and wellbeing achievements are you particularly proud of?

What are the risks that can kill or seriously injure people that you are currently worried about and why? How are you routinely monitoring the presence and effectiveness of controls for these risks, and what are you finding?

What are you doing to ensure leaders visibly demonstrate an unwillingness to compromise health and safety for productivity and/or profitability?

What are you doing to create a culture in which people feel able to report H&S concerns, mistakes, or accidents without fear of being blamed?

How are you ensuring that Health and Safety Representatives are being effectively involved in health, safety and wellbeing matters? What makes it hard to get work done safely around here?

Workers/Operators/ Health and Safety Representatives

What makes the biggest difference to health and safety going well at this site?

If you had \$50,000 to spend on one thing to make this site safer, what would you spend it on?

Are you sufficiently involved in health, safety and wellbeing matters? Do leaders involve you and listen to you?

Health and Safety Team

What is going well in health, safety and wellbeing here?

What could be done to make even more progress in health, safety and wellbeing here?

Are you sufficiently involved in health, safety and wellbeing matters? Do leaders involve you and listen to you?

SAMPLE OF TEMPLATE TO USE

Pre-Visit Planning

Define Objectives:

- ▶ Clearly outline the purpose of the site visit, whether it's for inspection, assessment, or relationship-building.
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Schedule in Advance:

- ▶ Coordinate with site management to arrange a convenient visit time.
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Notify Participants:

- ▶ Inform all relevant parties about the visit, including required site personnel.
-

Gather Information:

- ▶ Collect pertinent documents, drawings, safety protocols, and details about the site.
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Safety Precautions:

- ▶ Ensure all visitors are aware of compliance with safety regulations and provide necessary Personnel Protective Equipment in advance.
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During the Visit

Welcome and Introduction:

- ▶ Greet hosts, introduce your team, and state the visit's purpose and objective.
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Guided Tour:

- ▶ Have a knowledgeable guide lead the tour.
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Ask Questions:

- ▶ Foster open communication by seeking clarification and insights.
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Documentation:

- ▶ Record observations and key points through notes and media.
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Address Concerns:

- ▶ Promptly discuss and resolve any identified issues with site personnel.
-

Network and Build Relationships:

- ▶ Connect with key individuals on-site to foster collaboration.
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CONTINUES

Post-Visit Follow-Up

Debriefing:

- ▶ Hold a session to discuss findings, observations, and action items with your team.
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Report and Recommendations:

- ▶ Prepare a comprehensive report summarizing the visit, including recommendations.
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Feedback:

- ▶ Share feedback with the site management, acknowledging positives aspects and offering constructive criticism.
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Next Steps:

- ▶ Clearly outline follow-up actions, and establish a timeline for implementation.
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