

Five Steps to Successful Safety Observation

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Organizations will not achieve sustained excellent results in safety without a process in place that understands risk exposure prior to an incident or injury. To accomplish this, organizations must have a coaching approach to safety and an observation framework that guides the conversation. This article outlines five steps that have been used with great success. Whether peer to peer or supervisor to worker, it is all about being AWARE.

ANNOUNCE

The first step in the process is to let the person you intend to observe know that you are present. This initial contact sets the tone for the observation and resulting discussion. It is normal to wonder, "If they know I am there, they might do everything right." Wouldn't this be desirable? One of the goals should be to help create new habits, not to catch a rule violator. Another step of the methodology will reinforce this. However, how might trust be compromised if someone feels ambushed? Make sure everyone you will observe, and even those nearby, is aware of the observation before you begin.

WATCH

After the individual is aware, you should spend your designated time watching the job task. What will you look for? Ideally the answer is, "Can the employee perform the task safely?" and "Do I see anything that concerns me?" Lean behavior-based safety processes identify what safe looks like by positively defining the significant few precautions employees can take to reduce the probability of incidents. Generally this is better received than an observation attempting to determine if rules are being abided. Observations should determine if workers can perform the task safely and proactively identify concerns that might increase the chances of an injury. Observations should not be used as a faultfinding opportunity.

ASK

One important aspect of an observation is determining why a precaution was or was not taken. This insight is an effective mechanism that affects behavior change and prioritizes safety improvement initiatives. It is easy to become complacent with a frequently performed task. It is important for the individual being observed to

recognize the rationale for the decisions s/he is making, for both the ones that reduce risk exposure and the ones that introduce risk exposure. If you see a safe precaution being taken or an exposure to risk, ask the most appropriate questions: Why did you do it that way? Is that the way you always do it? Do you feel safe doing it that way? Is there a safer way to do it? Were you trained to do it that way?

REINFORCE

Observations are an opportunity to specifically point out the positive things a person is doing for his/her own safety. Emphasis should be placed on reinforcing what the worker is correctly doing to ensure that s/he is not just being lucky when it comes to injury prevention. If an individual has performed a discretionary precaution while performing the work, this is an excellent time to reinforce precisely what you observed and encourage him/her to continue. This helps change the common belief that safe is defined by the lack of incidents rather than by what people do to control risk exposure.

EXPRESS CONCERN

When risk is identified during an observation, the language chosen to provide feedback is critical. Expressing concern is a preferred approach rather than stating someone is "at risk" and "unsafe." The latter examples represent your opinion, which when introduced into a conversation can often compromise trust and respect. If an observer states concern with how a task is performed, this offers a better chance for a conversation leading to an understanding of why risk is a part of the task. Generally, this tactic is part of a more comprehensive methodology for leadership safety coaching or lean behavior-based safety. While the structure of such approaches is certainly valuable, the AWARE steps of an effective observation and feedback methodology are also independently important. ☺

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