



**SAFETY FIRST**

# Tailgate Forms & Documented Job Briefings



**APPA** American Public Power Association  
SEVENTY-FIVE YEARS





# Tailgate Forms & Documented Job Briefings



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SEVENTY-FIVE YEARS

About the American Public Power Association & RP<sub>3</sub>

The American Public Power Association (APPA) represents not-for-profit, community-owned electric utilities that power homes, businesses and streets in nearly 2,000 towns and cities, serving 48 million Americans. With no divided loyalties, these utilities are focused on a single mission — providing reliable electricity at a reasonable price, while protecting the environment. These public power utilities generate or buy electricity from diverse sources.

APPA’s Reliable Public Power Provider (RP<sub>3</sub>) designation program recognizes public power utilities that demonstrate leading practices in reliability, safety, work force development, and system improvement. RP<sub>3</sub> utilities are uniquely positioned to convey their commitment to providing reliable and safe electric service to their customers. RP<sub>3</sub> designees have proven themselves to be in accordance with industry standards for best practices in operations and many have seen improved performance through the application process. To achieve RP<sub>3</sub> program designation, a utility must demonstrate that it uses an accepted safety manual, conducts job briefings, and follows safe work practices — among other requirements.

# Introduction

Worker safety is at the core of a public power utility's commitment to service. Safety must begin with top management and be included in all aspects of operations from generation to linework, and all utility services in between. Benchmarking — through methods like tracking industry-accepted OSHA incident rates — and maintaining focus on frontline workers are both crucial to the delivery of safe and reliable electricity.

An important component of a strong safety program at an electric utility is a job briefing or tailgate meeting. While each utility has unique ways to determine appropriate safety programs for employees, tailgate meetings are seen across the board as a critical way to communicate safety expectations.

These meetings — whether called job briefings or tailgate meetings — are intended to let utility crews acknowledge potential hazards, review work procedures, and address safety measures before starting a job. The Occupational Safety and Health Administration requires that these meetings be held.

While documentation is not mandatory, many utilities create forms to ensure that they address all components of a tailgate meeting. Taking the extra step to document the meeting helps underscore the utility's commitment to safety and instills responsibility in employees.

The *APPA Safety Manual – 15th Edition*<sup>1</sup> and section 421 of the National Electrical Safety Code (NESC)<sup>2</sup> recommend that a job briefing should cover at least the following:

- Hazards associated with the job
- Work procedures involved
- Special precautions and risk mitigation
- Energy source/hazard controls
- Personal protective equipment requirements
- Emergency response information

This report, *Safety First: Documented Job Briefings and Tailgate Forms*, helps public power utilities document the safety measures addressed in job briefings and tailgate meetings.

For this report, the American Public Power Association has compiled forms submitted in applications for the Reliable Public Power Provider (RP3) program. The applications are from utilities that received diamond designation – the highest level of RP3 recognition. Information identifying the utilities has been stripped to ensure anonymity.

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<sup>1</sup> APPA Safety Manual, Fifteenth Edition 2012, "Job Briefings", American Public Power Association, Arlington, VA, 22202, [www.publicpower.org/safety](http://www.publicpower.org/safety).

<sup>2</sup> National Electrical Safety Code C2-2012, "General Operating Routines," IEEE Standards Association, New York, NY 10016-5997, USA, <http://standards.ieee.org/about/nesc/>.



EXAMPLE 1

# Job Briefing (Tailboard Discussion) Checklist

Date: \_\_\_\_\_ Time: \_\_\_\_: \_\_\_\_ a.m. p.m. (circle one)

Location: \_\_\_\_\_

Job number or account number: \_\_\_\_\_

Check Boxes



<b>1. HAZARDS ASSOCIATED WITH THE JOB</b>	<input type="checkbox"/>
<b>2. WORK PROCEDURES INVOLVED</b>	<input type="checkbox"/>
<b>3. SPECIAL PRECAUTIONS</b>	<input type="checkbox"/>
<b>4. ENERGY SOURCE CONTROLS</b>	<input type="checkbox"/>
<b>5. PERSONAL PROTECTIVE EQUIPMENT REQUIREMENTS</b>	<input type="checkbox"/>
<b>WRITE IN ANY ADDITIONAL SAFETY HAZARDS IDENTIFIED AND HOW THEY WERE ADDRESSED:</b>	
<b>EACH CREW MEMBER MUST INITIAL BOXES TO RIGHT INDICATING HE/SHE HAS PARTICIPATED IN AND UNDERSTANDS THE JOB BRIEFING (TAILBOARD). →</b>	<b>FOREMAN/ CREW LEADER</b>
	<b>CREW MEMBERS</b>
	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



EXAMPLE 2

# General Job Briefing Form

**Location / Project** \_\_\_\_\_

Name of Equipment \_\_\_\_\_

Supervisor \_\_\_\_\_

Job Start Date \_\_\_\_\_ Job Complete Date \_\_\_\_\_

**Work To Be Performed** \_\_\_\_\_

\_\_\_\_\_

**HAZARDS (Check all that apply):**

<input type="checkbox"/> Chemical	<input type="checkbox"/> Explosion	<input type="checkbox"/> Human Factors	<input type="checkbox"/> Sun
<input type="checkbox"/> Cold	<input type="checkbox"/> Exposure to Biological Hazards	<input type="checkbox"/> Mechanical Hazards	<input type="checkbox"/> Traffic
<input type="checkbox"/> Confined Space	<input type="checkbox"/> Exposure to Toxic Substances	<input type="checkbox"/> Noise	<input type="checkbox"/> Weather
<input type="checkbox"/> Confinement	<input type="checkbox"/> Fall Hazard	<input type="checkbox"/> Open Trench	<input type="checkbox"/> Wind
<input type="checkbox"/> Dangerous Conditions	<input type="checkbox"/> Fire	<input type="checkbox"/> Overhead Work	<input type="checkbox"/> Work Elevation
<input type="checkbox"/> Electrical	<input type="checkbox"/> Health	<input type="checkbox"/> Pedestrian	<input type="checkbox"/> Work Surface
<input type="checkbox"/> Entrapment	<input type="checkbox"/> Heat	<input type="checkbox"/> Pressure	<input type="checkbox"/> Special Hazards
<input type="checkbox"/> Ergonomic	<input type="checkbox"/> Heavy Lifting	<input type="checkbox"/> Sharp Objects	<input type="checkbox"/> Other Hazards
<input type="checkbox"/> Excavation	<input type="checkbox"/> Hot Work	<input type="checkbox"/> Sudden Release of Pressure	

**Clearances/LOTO Required**

Equipment \_\_\_\_\_ Clearance # \_\_\_\_\_

Supervisor \_\_\_\_\_ Date Taken \_\_\_\_\_ Released \_\_\_\_\_

**Confined Space / Hot Work Permit Required (Check all that apply):**

<input type="checkbox"/> Atmospheric Monitoring	<input type="checkbox"/> Entry Supervisor	<input type="checkbox"/> PPE
<input type="checkbox"/> Attendant	<input type="checkbox"/> Fire Watch	<input type="checkbox"/> Rescue / Contingency Plan
<input type="checkbox"/> Backup Number _____	<input type="checkbox"/> Hazardous Identification	<input type="checkbox"/> Weather
<input type="checkbox"/> Confined Space	Number of Qualified Personnel _____	
<input type="checkbox"/> Entrant	<input type="checkbox"/> Hot Work	

**Circle all that apply:**

<b><u>Trenching and Shoring:</u></b>	Competent Person	Shoring Permit	Soil Classification Hazard	
<b><u>Traffic Control:</u></b>	Flagger	Light Board	Signs	Barricades
	Traffic Control			
<b><u>Fire Protection:</u></b>	Fire Watch	Extinguishers	Fire Prevention Plan	Evacuation Routes
	Alarm/Notification			
<b><u>PPE:</u></b>	Respirators	SCBA	Eye Protection	Hearing Protection
	Skin Protection	FR Clothing	Hand Protection	Head Protection
	Foot Protection	Body Protection	Traffic Vest	Fall Protection





EXAMPLE 3

# Job Safety Briefing and Tips for Job Safety Meeting

Job #: \_\_\_\_\_ Foreman: \_\_\_\_\_ Date: \_\_\_\_\_

Special Hazards and Precautions (what is unique about this job?):

Work Procedure (what are the job steps or procedures involved in this job?):

Energy Source Control (what will be locked / tagged out, de-energized, tested, grounded?):

Ergonomics (Warm up, stretch, work as a team, good body position, and avoid overdoing it)

PPE, Tools, and Equipment (Discuss what is required, needed for the job):

By signing below, employees have been actively involved in the Job Safety Briefing and will work to ensure the job will be performed safely (include employee number with signature).

_____	_____
_____	_____
_____	_____



EXAMPLE 3

## Job Safety Briefing and Tips for Job Safety Meeting

### Tips for Conducting an Effective Job Safety Briefing:

#### Use the SWEEP method

Special hazards and precautions

Work procedures

Energy source controls

Ergonomics

PPE, tools and equipment

**What is a job safety briefing?** A short, informal safety discussion at the crew / employee level to identify, plan and discuss job-related hazards and safe work practices. **The goal is to avoid injuries and accidents.** When employees think safety first and are intentional about working as a team to identify and control hazards, work can be done safely.

**When and how should they be conducted?** Start of each, when conditions change, when returning from a break, or at a shift or crew change. Most briefings should take 2 – 5 minutes. Longer briefings may be needed for a long-term or complex job.

**What if I am working alone?** A job safety briefing is especially helpful when working alone. Follow the same checklist and perform a self-observation when working alone.

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#### **Special Hazards and Precautions:**

- |   |   |
|---|---|
| <input type="checkbox"/> Look above, below, behind and inside for hazards | <input type="checkbox"/> Identify and avoid slip, trip, fall hazards              |
| <input type="checkbox"/> Ensure proper work zone protection is in place   | <input type="checkbox"/> Be aware of terrain, property, site and facility hazards |
| <input type="checkbox"/> Keep safe order and housekeeping on the job      | <input type="checkbox"/> Identify & control any unusual hazards or conditions     |
|   | <input type="checkbox"/> Always communicate & beware of mental lapses             |

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#### **Work Procedures:**

- OSHA standards communicated and understood
- KUB / Dept procedures communicated and understood
- Job-specific procedures communicated and understood

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#### **Energy Source Controls:**

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> De-energize | <input type="checkbox"/> Ground      |
| <input type="checkbox"/> Isolate     | <input type="checkbox"/> Test        |
|                                      | <input type="checkbox"/> Tag or lock |

---

#### **Ergonomics:**

- |  |   |
|--|---|
| <input type="checkbox"/> Repetitive motions (take breaks, stretch, etc.) | <input type="checkbox"/> Awkward postures (take breaks, rotate, stretch, etc.)  |
| <input type="checkbox"/> Forceful exertions (use equipment or teamwork)  | <input type="checkbox"/> Contact stress / pressure points (take breaks, rotate) |
|  | <input type="checkbox"/> Vibrations (anti-vibration PPE, job rotations, breaks) |

---

#### **PPE, Tools and Equipment:**

- |   |  |
|---|--|
| <input type="checkbox"/> Hard hat/Safety glasses/Safety boots | <input type="checkbox"/> FR Clothing     |
| <input type="checkbox"/> Traffic Vest (Class II or III)       | <input type="checkbox"/> Fall protection |
| <input type="checkbox"/> Hearing protection                   | <input type="checkbox"/> Gloves / arm    |
| <input type="checkbox"/> Respiratory protection               | <input type="checkbox"/> Plant/insect    |

- Vehicle and equipment inspections performed & documented
  - Tools and safety resources in safe condition
  - Ensure tools & equipment are right for job and used correctly
-





EXAMPLE 4

# Job Briefing – Overhead T&D or Underground

Reason for Job Briefing: Start of Job  Change in Job  Restart of Job

Work Location: \_\_\_\_\_ Date & Time \_\_\_ / \_\_\_ / \_\_\_  a.m.  p.m.

Job # \_\_\_\_\_

Work Task: \_\_\_\_\_

## 1. Hazards Associated With Job

### Electrical Hazards

Yes	No	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Primary, Secondary Voltages: _____ / _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Under Build / Adjacent Energized Lines
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Positions / M.A.D.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Induction
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Capacitors
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Backfeed / Customer Generator
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

### Mechanical Hazards

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hardware, Pole, Structure, Clearances
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Damaged Equipment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Loads / Weight
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Equipment Position (reach)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

### Other Hazards

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Environmental (Oil, PCB, Asbestos)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Site Conditions, Terrain, Traffic, etc.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Weather Conditions (Hot/Cold/Wet)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

## 2. Work Procedures Involved

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Practice-Operations: _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cover-up
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gloving Procedures
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rigging
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____



EXAMPLE 4

### Job Briefing – Overhead T&D or Underground

#### 3. Special Precautions

Yes	No	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Traffic Control / Work Area Protection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Utility Locates
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Exposure (HALO rule)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Housekeeping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shoring Needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

#### 4. Energy Source Controls

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Clearance Order: _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Switching Order: _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hot Line Permit (Transmission)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Automatic Recloser to OFF position
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grounding
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

#### 5. Personal Protective Equipment

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hard Hat
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gloves
		<input type="checkbox"/>	Leather
		<input type="checkbox"/>	Class 0 (zero)
		<input type="checkbox"/>	Class 2 – with sleeves
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eye and / or Face Protection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FR Clothing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hearing Protection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High Visibility Apparel
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fall Protection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Respiratory Protection
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other _____

#### Crew Members (sign/print)

1.	2.
3.	4.
5.	6.

Job Briefing performed by (signature) \_\_\_\_\_  
 (signatures indicate understanding of all elements of job briefing)

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



EXAMPLE 5

# Electric Distribution Job Briefing

EFFECTIVE COMMUNICATION IS ACHIEVED WHEN EVERY MEMBER OF THE CREW HAS A FULL AND COMPLETE UNDERSTANDING OF:

- The job to be done
- The hazards which are present and how to eliminate or control them
- The work procedures to be performed and who will perform each task

Date \_\_\_\_\_ Location \_\_\_\_\_

Job / Task \_\_\_\_\_

Employee In Charge \_\_\_\_\_ Crew# \_\_\_\_\_

### HAZARDS ASSOCIATED WITH THE JOB

- Electrical Contact – work near or on energized conductors
- Hazardous Atmosphere – confined spaces, dust, mist, gases
- Engulfment – trench cave in, entrapment
- Fall Hazard – from/on unguarded elevation, aerial platform, pole, tower
- Chemical Hazard – toxic, flammable, reactive, corrosive
- High Noise Levels – hearing damage
- Moving Machinery – caught in, struck by
- Environmental Hazard – heat/cold/terrain
- Traffic – warnings, protection
- Other Utilities – overhead/underground

### WORK PROCEDURES INVOLVED

- Overhead electrical work procedures (job plan -- specific)
- Underground electrical work procedures (job plan -- specific)
- Voltage testing
- Atmospheric testing
- Confined Space entry requirements
- Excavation/Trench Protection
- Energized electrical work
- De-energized electrical work
- Trucks/machine grounding
- Traffic control / warning equipment, barricades, cones
- Other

The person in charge of the job shall develop the job plan in consultation with the other members of the crew covering the following:

- Clarify a task by describing observable steps
- Identify potential hazards
- Specify control measures
- Include in-depth work procedures and related hazards



EXAMPLE 5

## Electric Distribution Job Briefing

### SPECIAL PRECAUTIONS

- Critical safety equipment
- Attendant/observer
- Continuous monitor / atmosphere
- Weather
- Cover up

- Head protection
- Eye protection
- Work gloves
- Rubber gloves/sleeves
- F/R clothing
- Harness/lanyard
- Proper footwear
- Hearing protection
- Respiratory Protection

### ENERGY SOURCE CONTROLS

- Caution, Hold, Clearance order, Foreman's Safety Card
- Lockout/Tagout
- Isolation
- Testing
- Grounding
- Capacitor discharged
- Induced voltage

### TRUCKS / EQUIPMENT / TOOLS

- Daily inspection
- Operational check
- Tools available
- Tools inspected

### PERSONAL PROTECTIVE EQUIPMENT

#### Reminder

- Check to see if the hazards have been eliminated or controlled
- Check to see if PPE is being used correctly
- Determine if the job procedures outlined in the briefing are being followed

### OSHA 1910.269 Recommendations

“Number of briefings.” If the work or operations to be performed during the work day or shift are repetitive and similar, at least one job briefing shall be conducted before the start of the first job of each day or shift. *Additional job briefings shall be held if significant changes, which might affect the safety of the employees, occur during the course of the work.*

“Extent of briefing.” A brief discussion is satisfactory if the work involved is routine and if the employee, by virtue of training and experience, can reasonably be expected to recognize and avoid the hazards involved in the job. *A more extensive discussion shall be conducted:* If the work is complicated or particularly hazardous, or if the employee cannot be expected to recognize and avoid the hazards involved in the job.

### CREW MEMBERS SIGNATURES

_____	_____
_____	_____
_____	_____
_____	_____

Please retain this record for 60 days

This report was created by the American Public Power Association's Reliable Public Power Provider (RP3) program for the use of APPA members only.

For any questions, email [RP3@PublicPower.org](mailto:RP3@PublicPower.org) or contact APPA's RP<sub>3</sub> Staff:

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