Tailgate Forms & Documented Job Briefings
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About the American Public Power Association & RP3

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 (RP3) designation program recognizes public power utilities that demonstrate leading practices in reliability, safety, workforce development, and system improvement. RP3 utilities are uniquely positioned to convey their commitment to providing reliable and safe electric service to their customers. RP3 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 RP3 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 and section 421 of the National Electrical Safety Code (NESC) 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.


EXAMPLE 1

Job Briefing (Tailboard Discussion) Checklist

Date: ____________ Time: ___ : ___ a.m.  p.m. (circle one)
Location: ____________________________________________________________
Job number or account number: ________________________________

1. HAZARDS ASSOCIATED WITH THE JOB

2. WORK PROCEDURES INVOLVED

3. SPECIAL PRECAUTIONS

4. ENERGY SOURCE CONTROLS

5. PERSONAL PROTECTIVE EQUIPMENT REQUIREMENTS

WRITE IN ANY ADDITIONAL SAFETY HAZARDS IDENTIFIED AND HOW THEY WERE ADDRESSED:

EACH CREW MEMBER MUST INITIAL BOXES TO RIGHT INDICATING HE/SHE HAS PARTICIPATED IN AND UNDERSTANDS THE JOB BRIEFING (TAILBOARD).

<table>
<thead>
<tr>
<th>FOREMAN/ CREW LEADER</th>
<th>CREW MEMBERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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):

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

Clearances/LOTO Required

Equipment   Clearance #   Supervisor   Date Taken   Released

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

- Atmospheric Monitoring   - Entry Supervisor   □ PPE
- Attendant       □ Fire Watch       □ Rescue / Contingency Plan
- Backup Number       □ Hazardous Identification   □ Weather
- Confined Space   □ Number of Qualified Personnel   □
- Entrant   □ Hot Work

Circle all that apply:

Trenching and Shoring: Competent Person   Shoring Permit   Soil Classification Hazard
Traffic Control: Flagger   Light Board   Signs   Barricades
Fire Protection: Fire Watch   Extinguishers   Fire Prevention Plan   Evacuation Routes
PPE: Respirators   SCBA   Eye Protection   Hearing Protection
Skin Protection   FR Clothing   Hand Protection   Head Protection
Foot Protection   Body Protection   Traffic Vest   Fall Protection
Tailgate Forms & Documented Job Briefings  3
**EXAMPLE 2**

### General Job Briefing Form

<table>
<thead>
<tr>
<th>Atmospheric/Environmental Controls:</th>
<th>Protective Clothing Suitable for weather</th>
<th>Shelter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rest Area</td>
<td>Work Area</td>
<td>Water Quality</td>
</tr>
<tr>
<td>Temperature controls</td>
<td>Air Quality</td>
<td></td>
</tr>
<tr>
<td>Work/Rest Regimen</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Emergency Action Plan:</th>
<th>Evacuation Pre-Plan</th>
<th>Evacuation Routes</th>
<th>Employee in Charge</th>
<th>Egress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assembly Point</td>
<td>Notification of Personnel</td>
<td></td>
<td>Accounting of Personnel</td>
<td></td>
</tr>
</tbody>
</table>

**Special Precautions and Instructions**

* 
* 
* 
* 

**Work Date:**

Briefing Attended By: "ALL EMPLOYEES MUST SIGN BELOW"

<table>
<thead>
<tr>
<th>Print &amp; Sign Name:</th>
<th>Briefing Performed By:</th>
<th>Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Emergency Contact Information**

- Emergency Services: 911
- From BWP Phones: 8, 911
- Energy Control Center: (818) 238-3750
- Burbank Fire: (818) 847-8611
- Burbank Police: (818) 238-3000

**ATTACH ADDITIONAL SHEETS IF NEEDED**

***SUPERVISORS SHALL RETAIN ALL JOB BRIEFING FORMS***
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.

<table>
<thead>
<tr>
<th>Special Hazards and Precautions:</th>
<th>Work Procedures:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Look above, below, behind and inside for hazards</td>
<td>□ OSHA standards communicated and understood</td>
</tr>
<tr>
<td>□ Ensure proper work zone protection is in place</td>
<td>□ KUB / Dept procedures communicated and understood</td>
</tr>
<tr>
<td>□ Keep safe order and housekeeping on the job</td>
<td>□ Job-specific procedures communicated and understood</td>
</tr>
<tr>
<td>□ Identify and avoid slip, trip, fall hazards</td>
<td>□ Ground</td>
</tr>
<tr>
<td>□ Be aware of terrain, property, site and facility hazards</td>
<td>□ Test</td>
</tr>
<tr>
<td>□ Identify &amp; control any unusual hazards or conditions</td>
<td>□ Tag or lock</td>
</tr>
<tr>
<td>□ Always communicate &amp; beware of mental lapses</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Energy Source Controls:</th>
<th>Ergonomics:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ De-energize</td>
<td>□ Repetitive motions (take breaks, stretch, etc.)</td>
</tr>
<tr>
<td>□ Isolate</td>
<td>□ Forceful exertions (use equipment or teamwork)</td>
</tr>
<tr>
<td>□ Ground</td>
<td>□ Awkward postures (take breaks, rotate, stretch, etc.)</td>
</tr>
<tr>
<td>□ Test</td>
<td>□ Contact stress / pressure points (take breaks, rotate)</td>
</tr>
<tr>
<td>□ Tag or lock</td>
<td>□ Vibrations (anti-vibration PPE, job rotations, breaks)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PPE, Tools and Equipment:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Hard hat/Safety glasses/Safety boots</td>
<td>□ FR Clothing</td>
</tr>
<tr>
<td>□ Traffic Vest (Class II or III)</td>
<td>□ Fall protection</td>
</tr>
<tr>
<td>□ Hearing protection</td>
<td>□ Gloves / arm</td>
</tr>
<tr>
<td>□ Respiratory protection</td>
<td>□ Plant/insect</td>
</tr>
<tr>
<td>□ Vehicle and equipment inspections performed &amp; documented</td>
<td></td>
</tr>
<tr>
<td>□ Tools and safety resources in safe condition</td>
<td></td>
</tr>
<tr>
<td>□ Ensure tools &amp; equipment are right for job and used correctly</td>
<td></td>
</tr>
</tbody>
</table>
### 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**
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>□</td>
<td>□</td>
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</tbody>
</table>

   - Primary, Secondary Voltages: _________/_______
   - Under Build / Adjacent Energized Lines
   - Work Positions / M.A.D.
   - Induction
   - Capacitors
   - Backfeed / Customer Generator
   - Other __________________________

   **Mechanical Hazards**
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |

   - Hardware, Pole, Structure, Clearances
   - Damaged Equipment
   - Loads / Weight
   - Equipment Position (reach)
   - Other __________________________

   **Other Hazards**
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |

   - Environmental (Oil, PCB, Asbestos)
   - Work Site Conditions, Terrain, Traffic, etc.
   - Weather Conditions (Hot/Cold/Wet)
   - Other __________________________

2. **Work Procedures Involved**
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |
   | □   | □  | □   |

   - Work Practice-Operations: __________________________
   - Cover-up
   - Gloving Procedures
   - Rigging
   - Other __________________________

---
EXAMPLE 4

Job Briefing – Overhead T&D or Underground

3. **Special Precautions**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

Traffic Control / Work Area Protection
Utility Locates
Exposure (HALO rule)
Housekeeping
Shoring Needed
Other

4. **Energy Source Controls**

<table>
<thead>
<tr>
<th>Clearance Order:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switching Order:</td>
</tr>
<tr>
<td>Hot Line Permit (Transmission)</td>
</tr>
<tr>
<td>Automatic Recloser to OFF position</td>
</tr>
<tr>
<td>Grounding</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

5. **Personal Protective Equipment**

<table>
<thead>
<tr>
<th>Hard Hat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gloves</td>
</tr>
<tr>
<td>Leather</td>
</tr>
<tr>
<td>Class 2 (zero)</td>
</tr>
<tr>
<td>Class 2 – with sleeves</td>
</tr>
<tr>
<td>Eye and / or Face Protection</td>
</tr>
<tr>
<td>FR Clothing</td>
</tr>
<tr>
<td>Hearing Protection</td>
</tr>
<tr>
<td>High Visibility Apparel</td>
</tr>
<tr>
<td>Fall Protection</td>
</tr>
<tr>
<td>Respiratory Protection</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

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 ____________________________ Crew# ________________

Employee In Charge ____________________________

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

ENERGY SOURCE CONTROLS

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

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 or contact APPA’s RP3 Staff:

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