THE EFFECTIVE HSE PROFESSIONAL · BOOK 1

Workbook: Chapters 1–10

Influence Without Authority for HSE Professionals

Completed examples from the book (Calder Street, a fictional training scenario). Print at 100% (actual size), single-sided. Each page works on A4 or US Letter paper. Complete the sheets by hand with a pen; no software is needed.

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Record roles and facts, not the names or health details of individual workers.

Permission (worksheets WS-01 to WS-10). Readers may print, copy and adapt the worksheets for their own use and for internal use with their teams. Resale and public redistribution require permission.

WS-01 Influence preparation sheet

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario)

Date	Concern (a few words; no names or health details)	Prepared by (role, not name)
Week 23, Tuesday	Drylining boards carried up the core stair	HSE adviser

0. Check first (tick one)

☐ **Someone could be seriously harmed now, or before we can talk. STOP: use the site's intervention and stop-work arrangements now, and report it.**

☐ **Not sure: treat it as urgent and get a competent person to look.**

☒ No immediate serious exposure: continue.

The open level 5 gate on Monday was a separate, urgent matter, dealt with at once under the stop-work rule.

1. What I observed *Where, when, what exactly. Seen, told or recorded?*

Week 23, Monday, 10:10-10:30, core stair: I counted 14 two-person trips carrying full boards from the laydown to level 4. Other trades passed them on landings 3 times. Seen by me. Lucía raised the same at the week 21 safety committee (minute 21.4).

2. Why it matters *For people and the work. Unknowns?*

Repeated two-person carries up four floors: strain over time; congestion on the main stair; slow board supply. Not known: whether anyone has reported discomfort (ask Lucía; no names). Kwame estimates about three more weeks of boards for levels 4 and 5.

3. Who can decide *Who can say yes? Whose help is needed?*

Graham (project manager) approves the weekly crane plan. Tomasz (works supervisor) drafts it and books the hoist. Cooperation needed: Kwame and his office (delivery times), lifting coordinator (lift plan).

4. Their constraints: confirmed *They or a record told me.*

Crane on facade panels all week (posted crane plan). Hoist booked by M&E most of the day (Kwame; I have not seen the bookings). Crew paid on area completed (Kwame). Kwame agrees I may raise the board supply, not crew complaints.

Assumed: check first *My guesses.*

Graham's priority is closing in levels 6 and 7 before winter, so he will see any board lift as lost facade time. A lift plan for landing boards on the platforms may already exist: ask Tomasz.

5. My request *One decision, an owner, a date.*

Graham to ask Tomasz to look for a short crane slot for the next two board deliveries, and to decide at the week 23 Thursday coordination meeting.

6. Options I can offer *Two or more, or a trial.*

A: crane lands board packs on the level 4 and 5 loading platforms before facade lifts start. B: an early hoist slot for boards. Try the first of the two deliveries, then review.

7. Likely pushback; my honest answer

"Crane time is for the facade. Has anyone been hurt?" Not that I know of; I am not claiming it. I am asking for a decision on facts, with a trial, and Tomasz can check the cost.

8. If no, or not yet *Record; interim; next step; escalation.*

Record the decision, who made it, and that carrying continues. Interim (agreed with Kwame on Monday): carry in the quieter part of the morning and rotate carriers; tell Graham. Back on the Thursday agenda; if still undecided at the week 24 coordination meeting, escalate to the construction director with the company HSE manager (my line manager) informed.

9. Outcome *Circle: Agreed / Trial / Declined / Deferred / Escalated. Who does what, by when? Follow-up date.*

DEFERRED (Wednesday 07:50). Facade crane time not moved this week. Graham will ask Tomasz to look for an early slot and report on Thursday. Trolleys: subcontract matter (Graham), so I raise them, and board packaging, with our package manager by Friday. Carrying continues with the interim arrangement; Graham told, no objection. Follow-up: Thursday 14:00.

WS-02 Stakeholder and decision-rights map

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Prepared 13:25-13:55, before the meeting

Decision (one sentence)	Needed by (date)	Prepared by (role, not name)
Trial on week 24 Friday at 07:00: the crane lifts one delivery (two packs of boards) to the platforms between 07:00 and the facade start at 08:00	Week 23, Thursday 14:00 coordination meeting	HSE adviser

Roles (printed on both sheets). Write or circle every role a person holds; one person can hold several roles in the same decision. The letters are for tight cells and are not RACI letters.

Decides (D): can say yes or no to the decision, or to one part of it

Does the work (W)

Must be consulted (C): has a right, or a duty, to be asked before it is decided

Supplies a resource (S): commits people, money, equipment, space or time

Exposed or affected (E): their safety or their work changes

Influences (I): shapes whether others support it, without formal authority

Who (role)	Roles in this decision	What they need or worry about	What I need from them; next step and date
Graham Ellis, project manager	Decides; Supplies a resource (budget)	No facade time lost; cost known before he agrees	Decision at 14:00; tell him the slinger cost first
Dan Whitfield, lifting coordinator	Decides (lift plan)	One pack on a platform at a time; his plan sets the slingers and supervision for each lift	Revised lift plan by Tuesday; he briefs the crew on receiving loads
Tomasz Nowak, works supervisor	Supplies a resource (crane time)	No clash with the facade crew at 08:00	Report the 07:00-08:00 window at 14:00; ask the facade supervisor about slingers
Crane operator	Does the work	Starts 07:00; pre-use checks first, so the first lift is after 07:00	Through Tomasz; first-lift time to be set in Dan's plan
Facade supervisor	Supplies a resource (slingers); Exposed or affected	Slinger/signallers from 07:00, paid; crane back for the facade at 08:00	Tomasz asks before 14:00; numbers from Dan's plan
Ian Fraser, contracts manager (drylining)	Supplies a resource (crew hours, delivery)	No unpaid crew time; one trial, not a precedent	Phoned 13:40: Thursday-afternoon delivery if ordered by Tuesday noon; paid 07:00 start, trial only; wants it in writing (by whom? ask Priya)
Kwame Mensah, drylining foreman	Does the work; Influences	Steady board supply; crew earnings; not blamed if the crane runs late	Ask him if I can talk to the crew on Monday; who can start at 07:00? (not yet known)
Drylining crew (through Kwame, Nico, Lucía)	Does the work; Exposed or affected; Must be consulted	Start at 07:00 instead of 07:30; carrying the boards in from the platform; the physical load of carrying	Ask how Friday would really work, Monday
Lucía Ferreira, worker safety representative	Must be consulted; Influences	Raised items closed, not just minuted	Ask her view before Monday; tell her the outcome
Priya Nair, package manager	Decides (subcontract scope)	Variation cost; clear scope	Ask at 14:00: trolleys and packaging scope; who confirms the trial to Ian

Who (role)	Roles in this decision	What they need or worry about	What I need from them; next step and date
M&E supervisor	Supplies a resource (hoist; level 4 platform); Exposed or affected	The hoist first thing for riser materials; level 4 platform until Wednesday	Informed through the meeting minutes
Other trades using the core stair	Exposed or affected	A clear stair	Informed through the meeting minutes
Before you go: who is exposed to the work but missing from this map? Who decides the plan, the money and the people? Need more rows? Continue on a second sheet.			

WS-03 Site-listening guide

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario)

Date	Work activity	Spoke with (roles, not names)
Week 24, Monday	Board packs for Friday's trial: platform to work area, level 5	Two operatives (one interpreting)

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: use the site's intervention and stop-work arrangements, and report it.**

☒ No immediate serious exposure: continue.

1. What I think I know *Assumptions to test.*

The trial removes the stair carrying. Both packs on level 5 (Dan's draft) is fine. The crew's problem is the stair. Level 4 platform full of M&E materials until Wednesday (Dan's draft; not seen myself).

2. Questions I will ask *Walk me through it. What makes it harder than it looks? What would you change? What could make that worse? (A menu: use your own words.)*

Walk me through Friday from the moment the pack lands. What makes it harder than it looks? What would you change? What could make that worse?

3. Seen *What I observed myself.*

Level 5: platform to work area about 25 metres (paced out on foot). Inside the gate: marked escape route, nothing can be set down. Ramp over cable trunking at the corridor door.

4. Told *Close to their words; no names.*

Operative (through his colleague): we cannot put boards down inside the gate, so before the second lift we must carry about 30 boards in, in about twenty-five minutes. No trolley over the ramp. If we are slow, the crane is late for the facade at 08:00, and it is our fault. Worse in rain or wind.

5. What changed my understanding

The trial moves the carrying from the stair to a rush at the platform. The stair count was not the whole problem.

6. To check: with whom, by when *Then note who confirmed it, and when.*

Dan and Tomasz by Tuesday 12:00: level 4 for one pack if M&E clear it Wednesday; flat cover over the trunking (M&E subcontractor). Second pack another morning: laydown (Tomasz), lift (Dan), cost (Graham). Ian's order deadline Tuesday noon. Graham owns the Wednesday fallback.

7. What I promised to tell them, and when

Tell the crew where it stands: Wednesday at 07:30, at the laydown, with the colleague who interprets.

WS-04 Evidence-to-request worksheet

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario)

Date	Concern (a few words)	For (role) and deadline
Week 24, Monday 14:40	Friday's trial: both packs to level 5, about 25 minutes apart	Lifting coordinator and works supervisor; Tuesday 12:00

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: this is not a briefing. Use the site's intervention and stop-work arrangements, and report it.**

☒ No immediate serious exposure: continue.

Nothing is lifted until Friday. Today's stair carrying continues under the interim arrangement.

1. Seen *What I observed myself: where, when, measured or counted.*

Mon 10:00, level 5 (paced out on foot): platform to work area about 25 m. Marked escape route inside the gate: nothing can be set down. Ramp over cable trunking at the corridor door. Read in Dan's draft: level 4 platform full of M&E materials until Wednesday; lifts at about 07:15 and 07:40, both to level 5.

2. Told *By role, close to their words. Directly, by phone, or through an interpreter?*

Operative, through a colleague interpreting: the first pack must be carried in before the second lift, about 30 boards, two to a board, in about 25 minutes. Trolleys and pallet trucks stop at the ramp. Afraid of blame if the crane is late for the facade at 08:00. Worse in rain or wind. Foreman, told separately: the same worry.

3. Not yet known *Each gap, and who would know.*

Crew in at 07:00 on Friday (Kwame, Ian). Level 4 clear by Wednesday? (M&E supervisor, via Tomasz). Flat cover instead of the ramp? (M&E subcontractor, Tomasz). Can the lift times move? (Dan; facade at 08:00, Tomasz). Does any option need a different order? (Ian, by Tue 12:00).

4. What it means for the work *In the work's units: loads, minutes, metres, people. If a number depends on an unknown, show both cases.*

30 two-person carries of about 25 m, plus the walk back, between two lifts about 25 minutes apart, past the open gate, with the crane waiting. Four crew in: two pairs, 15 carries each. Six in: three pairs, 10 each. The rush is built into the timing.

5. What I am not claiming

Not claiming: anyone is hurt; the lift itself is unsafe; the draft breaks a rule. Not naming who told me.

6. My request *One decision or action, its owner, when.*

Dan (with Tomasz), Tue 10:30: look at the options on site with Kwame and the crew before the plan is final, Tue afternoon.

7. The 60-second version *Seen, told, not yet known, what it means, the request. Say it aloud once.*

Dan's draft lands both packs on level 5, about 25 minutes apart. Nothing can be put down inside the gate and trolleys can't pass the ramp, so about 30 boards must be carried in by hand before the second lift. Nobody's hurt and the lift isn't the problem; the timing creates a rush. I don't know yet how many crew are in at seven, or whether level 4 will be clear. Can we look at the options on site with Kwame and the crew this afternoon, before the plan is final?

WS-05 Options and constraints sheet

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Verdicts from the week 24 Tuesday 15:00 meeting on level 4

Decision and who decides	Fixed limits (an option that breaks one falls away)	Prepared by (role, not name)
Friday week 24: how the two packs are lifted and taken in. Lift plan: Dan. Trial: Graham, Wednesday 15:00	Dan plans the lifts and sets slingers and supervision; one pack per platform at a time; escape routes clear	HSE adviser

Before the meeting, write the three or four constraints every option is tested against in the Check headings. In each option, say what happens to every part of the work. Verdict: Falls away (why) / Preferred, if… / Fallback.

Option (both packs)	Order	Crew at 07:00	Space for both packs	Route	Who must agree or verify; by when	Verdict
1. Pack 1 to level 5, about 07:15; pack 2 to level 5, about 07:40 (Dan's draft)	OK	4 expected (Ian to confirm): two pairs, 30 boards, 25 min	Pack 1 must be cleared before pack 2	By hand, 25 m, ramp	Dan, Tue 15:00: will not plan it	Falls away (Dan)
2. As 1 (both packs to level 5), but pack 1 boards set down inside the gate	OK	-	No: escape route	-	Tomasz, Tue 15:00	Falls away: fixed limit
3. Smaller packs for both pack 1 and pack 2	No: placed before Tue 12:00, two full packs	-	-	-	Ask Ian before the next order	Falls away for this delivery
4. Pack 1 to level 4, set down by the column line, trolleyed; pack 2 to level 5, no lift after it	OK	4 from 07:00 on level 4, 2 more at 07:30 on level 5; if not confirmed, 6 at 07:30	Level 4 only if cleared and passed	Level 4: about 10 m, no ramp. Level 5: by hand, ramp, own pace	M&E: clear by Wed 10:00. Dan: check platform and load, Wed before 15:00. Tomasz: mark area, Wed. Graham: third slinger hour, Wed 15:00. Ian: confirm 4 at 07:00, Wed	Preferred, if level 4 passes and Graham approves
5. Pack 1 to level 5 Friday; pack 2 at the laydown, lifted Monday 07:00	OK	Friday: 4 enough. Monday: not agreed	Laydown holds one delivery; none due till Tuesday; needs sheeting and locking	Level 5: by hand, ramp, own pace	Graham, Wed 15:00: Monday crane hour and slingers. Ian, Wed: Monday start. Dan, Fri: Monday plan and brief. Tomasz, Thu: sheet and lock	Fallback, if level 4 fails

Before the decision: does every surviving option have an owner and a time for each condition? Who will tell the people affected what is still undecided, and when?

WS-06 Objection diagnosis card

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario)

Date	The plan or request objected to	Objection from (role)
Week 24, Wednesday 08:00; box 3 onwards after 09:30	Dan's receiving brief, Thursday 07:30, interpreted by a crew colleague	Crew colleague who interprets informally (agreed to be named)

0. Check first (tick one)

☐ **The objection is about serious, immediate danger, or someone has stopped work because they believe they are in danger now. STOP: this is not resistance to manage. Act on it under the site's intervention and stop-work arrangements, and report it.**

☒ A planned change or request: continue.

Nothing is lifted until Friday. Nobody has refused work because of danger now.

1. What was said *Their words, as close as you can. Who, where, when; directly or through someone else?*

Laydown, Wed 07:45, directly, in English: "Tomorrow, Dan's brief. I don't interpret that. Somebody else." Then: "Monday was different." Then "OK" after I pressed him.

2. What I first assumed *Write it down so you can test it.*

He's nervous; he'll be fine once Dan keeps it simple. (Not a diagnosis. And I took "OK" as agreement.)

3. The question I asked *Open, about the obstacle: what would make it hard? Then: anything else?*

"What would make tomorrow's brief hard for you?" Then: "Is there anything else about Friday I should know?"

4. What I heard *Facts, separate from feelings. Mark what changed my understanding.*

Lifting words (signals, exclusion zone, safe working load): he is not sure of them in their language. If one is wrong, he carries the blame; he is not an interpreter. Emil wants to hear it properly. CHANGED MY UNDERSTANDING: he is one of the two who come in the car, at about 07:25. At 07:00 on level 4 there would be Emil, his colleague and two more: nobody to explain a change. He will help with "wait, go, stop" on the day.

5. Diagnosis *Feasibility / Misunderstanding / Authority / Resources / Disagreement. Underline those that apply; say why.*

Feasibility: two of the four at 07:00 could not follow a change of instruction on level 4. Resources: transport for Nico; language support for the brief. Authority: interpreting a lifting brief is not his job; the brief is Dan's; getting it to the crew in a form they understand is Ian's company's responsibility, as their employer. Not disagreement: he supports the trial. Not misunderstanding.

6. What changes *The plan? What I report, and to whom? Nothing (and why)?*

Plan: unchanged (option 4). Condition: four at 07:00 only if Nico is there by 07:00; otherwise all six at 07:30 (Dan accepts). Brief: language support needed. Report to Graham rewritten: not "brief interpreted by a crew member".

7. Owner, by when; escalate? *Who can resolve each part, and when. Escalate only if the owner cannot or will not act.*

Ian: van for Nico, and a colleague who speaks their language for the brief; answer Wed 17:00. Dan: check of understanding, who works at the platforms; Thu 07:30. Me: tell Dan (done 11:45) and Graham (15:00). No escalation needed.

WS-07 Decision brief and record

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Sent Wednesday 15:50

Meeting (date, time, place)	Decision owner	Present (roles)
Week 24, Wednesday 15:00, project manager's office	Project manager	Project manager; lifting coordinator; works supervisor; package manager; HSE adviser

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: do not hold this for a meeting. Use the site's intervention and stop-work arrangements, and report it.**

☒ A planned decision: continue.

Stair carrying continues under the interim arrangement until the trial.

1. Decision asked (before the meeting) *One sentence, answerable yes or no. Send it in advance.*

Does Friday's trial go ahead on the revised plan (pack 1 to level 4, pack 2 to level 5), with a third slinger hour, and Dan's brief on Thursday at 07:30 in place of Tuesday? (Sent to Graham 14:45.)

2. Decided *What, by whom. Anything declined, and why.*

Graham, Wednesday 15:00: the trial goes ahead on Friday. Pack 1 to level 4 (set down by the column line, trolleyed); pack 2 to level 5, no lift after it; both lifts made 07:00–08:00, once Dan signs the plan. Third slinger hour approved, Friday only. Dan's brief Thursday 07:30 accepted in place of Tuesday. No crane time after 08:00: a pack not lifted by then stays at the laydown and Graham decides when. DECLINED: booking a Monday lift in advance. Fallback option 5 not used: level 4 passed.

3. Resources confirmed *Only what is confirmed now: who confirmed it, and how.*

Crane 07:00–08:00, operator checks first (Tomasz). Level 4 cleared 10:20, passed Dan's check 11:30. Set-down area marked (Tomasz, 09:00). Paid 07:00 start, Friday only (Priya, in writing, Tuesday). Crew trolley on site, level 3 (Priya's report).

4. Conditions outstanding *Each: owner, time, and what happens if it is not met.*

Dan, Wed evening: sign the plan; if unsigned, no lifts Friday. Tomasz, Wed: book 3 slinger/signallers from 07:00 (laydown, level 4, level 5); if not, tell Graham and Dan by 17:00. Ian, Wed 17:00: van for Nico. If yes, 4 at 07:00 on level 4, 2 at 07:30 on level 5; if not, all 6 at 07:30: lifts still by 08:00, boards off the platforms by about 08:30 (Dan's estimate). Dan, signed plan: gate control after 08:00 when slingers finish; people needed per platform. Ian, Wed 17:00: colleague who speaks their language joins Dan's brief by phone. Dan decides who works at the platforms in any case. Kwame and Dan, Thu after the brief: assign people; if fewer than 4 for level 4 from 07:00, all start 07:30; if too few to clear a pack by about 08:30, Dan does not lift it (stays at the laydown; Graham decides). Kwame, Thu: trolley to level 4.

5. Not decided here *Technical checks, briefs, on-the-day calls, other owners' decisions; with their owners.*

Dan: the plan and its signature; Thursday's brief and the check of understanding; Friday's checks of the packs. Dan and the crane operator: weather call, Fri 06:45. If called off: both packs stay at the laydown, sheeted and locked (Tomasz); Tomasz rings Graham by 08:00; Graham decides then. Not before week 25: flat cover (M&E subcontractor, Tomasz). Next order: smaller packs (Ian, via Priya).

6. Who tells whom, when *Especially the people doing the work.*

Me to Kwame, Wed 15:30 (done). Me to Kwame and Dan: Ian's answers, Wed 17:00. Kwame and Dan to the crew: start times and brief arrangements, Thu 07:30. Ian's office to Nico: the van. Dan to Kwame: weather call, Fri by 06:50.

7. Read back and sent *Time; anyone who disagreed; who received the record.*

Read back 15:12; agreed by Graham; nobody disagreed. Sent 15:50 to Graham, Dan, Tomasz, Priya, Ian, Kwame.

WS-08 Contractor handover sheet

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Sent Thursday 15:00

Work and date	Employers at this interface	Prepared by (role, not name)
Friday week 24: lifting and receiving two board packs (levels 4 and 5)	Principal contractor; drylining subcontractor; facade subcontractor (slingers); M&E subcontractor (level 4 platform, level 5 cables)	HSE adviser

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: do not wait for a handover. Use the site's intervention and stop-work arrangements, and report it.**

☒ A planned arrangement: continue.

Nothing is lifted until Friday.

1. What each party provides *One line per employer. Confirmed items only: who confirmed, how, when.*

Principal contractor: crane 07:00–08:00, no crane time after 08:00 (Graham, Wed 15:00); lift plan for a 07:30 crew start, signed (Dan, Wed 19:10); Dan controls the platform gates from 08:00 until the last board is off. Facade subcontractor: three slinger/signallers 07:00–08:00, laydown, level 4, level 5 (booked by Tomasz, Wed 16:30). Drylining subcontractor: all six crew start 07:30, no van (Ian, phone, Wed 17:05); office colleague who speaks the crew's language, phone, Thu 07:30, 20 minutes (Ian, same call); three messages in both languages (sent to Kwame Thu 13:40); trolley on level 4 (Kwame, Thu 11:00). M&E: level 4 platform cleared Wed 10:20 (checked by Dan, 11:30); ramp stays this week (Tomasz).

2. What stays with each employer *Their people, their instructions, their plan. Not moved by agreement.*

Drylining subcontractor: its crew's roles, instructions and messages (Ian, Kwame). Principal contractor: the lift plan and who works at the platforms (Dan). Facade subcontractor: its slingers.

3. Language and understanding *How information reaches each worker; who supports; stated limits.*

Dan's brief by demonstration and show-back; phone support from Ian's office (line dropped 07:40); Ian's colleague knows the paperwork, not cranes, so the demonstration carries the brief; Ian's office phoned Emil's colleague Thu 09:00 to explain his trolley role. Nico (agreed to be named): simple words such as "wait" on the day, nothing technical, not the brief.

4. Changes on the day *Who decides; who tells whom; by when; how.*

Dan and the crane operator decide at 06:45 (weather, packs). Dan rings Kwame by 06:50. Kwame sends one of Ian's three messages to the crew's phone group by 06:55. If called off, both packs stay at the laydown, sheeted and locked; Tomasz rings Graham by 08:00; Graham decides. A pack not lifted by 08:00 stays there on the same terms. Kwame is on level 4 to pass on any change there.

5. Missed messages *How receipt is confirmed; who follows up, by when; backstop.*

Everyone replies "OK", including both in the car, separately. Kwame rings anyone without a reply by 07:05 and meets anyone still missing at the gate at 07:25. Backstop: if Dan cannot reach Kwame by 06:55, he rings Ian, who sends it by 07:00 and rings anyone without a reply by 07:10; Dan is at the gate at 07:25. Route tested Thu wk 24, 14:00: 5 replied by 14:20; Kwame had to ring 1 person, who replied 14:35; gate check and Ian's backstop not needed.

6. Open items *Not yet confirmed: owner, time.*

Second check of Emil's colleague on the gate order, with language support: Dan and Ian, before the next delivery (until then he works on the level 4 trolley, not at a platform). Flat cover for the level 5 ramp: M&E and Tomasz, not before week 25.

7. Confirmed with *Roles who agreed it; when sent, to whom.*

Agreed Thu 08:00 by Dan, Kwame and Ian (phone). Sent Thu 15:00 to Dan, Kwame, Ian, Tomasz, Graham.

WS-09 Follow-up record

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Closed Thursday week 25, 07:30

Commitment (a few words)	Owner (role) and deadline	Followed up by (role)
Date for the flat cover over the level 5 cable trunking	Works supervisor; Monday week 25, 12:00	HSE adviser

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: this is not a follow-up. Use the site's intervention and stop-work arrangements, and report it.**

☒ A planned commitment: continue.

Not urgent: without the cover, level 5 boards are carried by hand over the ramp at the crew's own pace (Friday week 24: two people, 30 boards, about 50 minutes, no rush reported).

1. Commitment *What, who promised, to whom, by when; where it was recorded.*

Tomasz: the M&E subcontractor's date for fitting a flat cover in place of the level 5 ramp, by Monday week 25, 12:00. Agreed at the week 24 Friday 09:15 debrief (Dan, Tomasz, Kwame, me); in my notes.

2. At the deadline *Done / part done / not done. What I checked, not assumed.*

Monday 12:00: no date. 12:05: I emailed Tomasz and copied Graham before asking (wrong; apologised at 12:40).

3. Reminder or escalate? *Can the owner still deliver? What is in the way? What does delay cost, by when? Anyone in danger now?*

Owner able to deliver? Not alone: M&E's supervisor cannot release the labour; their contracts manager decides. What is in the way: another employer's programme; the project manager coordinates the subcontractors. Cost: Graham decides on the week 25 delivery Tue wk 25, 08:00; without a cover, level 5 is carried by hand again. Danger now: no. So: escalate one decision, with Tomasz's agreement.

4. Reminder *When, how, new time.*

Not used for this one: owner blocked. (Dan's lift record: reminder Fri wk 24 12:10, received 12:30.)

5. Escalation *To whom, when, owner told; decision asked.*

Graham, Mon 14:00, with Tomasz present: will you ask M&E's contracts manager for a date to fit the cover before Thursday's delivery?

6. Outcome and evidence *What happened; who confirmed; how it was checked.*

Graham, Mon wk 25 15:30: fit Wed by 16:00; written confirmation to Tomasz Mon 16:50. Fitted Wed 15:40. Tomasz checked Wed 16:30: flat, fixed, cables in the trunking. Kwame pushed the empty trolley across, 16:45.

7. People told *Who told the people affected, when.*

Kwame to the crew, Tue wk 25 07:30 (date; Tomasz to check; ramp stays until then), with a short message from Ian's office in both languages. Kwame to the crew, Thu wk 25 07:30: cover in and checked; week 25 Friday lifts as in the week 24 trial, subject to the 06:45 call; level 5 by hand to a trolley beyond the escape route, then over the cover (Dan's revised plan; second trolley from Ian). Committee informed: week 25 Thursday (Samira).

WS-10 30-day plan

COMPLETED EXAMPLE

Completed example: Samira Haddad, HSE adviser, Calder Street (fictional training scenario). Written with the worker safety representative

Start date	Live issue (a few words)	Planned with (role)
Week 25, Thursday (day 1)	Boards to levels 4 and 5 without stair carrying, for the rest of the drylining	Worker safety representative

0. Check first (tick one)

☐ **Someone could be seriously harmed now. STOP: act today. Use the site's intervention and stop-work arrangements, and report it. This plan is for planned improvements.**

☒ A planned improvement: continue.

Nobody is exposed to serious harm now. Committee item 21.4 stays open.

1. The live issue *One sentence: what, where, who does the work.*

Getting boards to levels 4 and 5 for the remaining deliveries without carrying them up the core stair. About two weeks of boards remain (Kwame's revised estimate, Monday week 25). One delivery observed so far (week 24); the week 25 delivery lifts on Friday, subject to the 06:45 call. The drylining crew does the work.

2. Whom I will hear from *People doing the work first; owners of limits and resources. How I reach people who may not speak up in a group or in English.*

The crew, through the foreman and the worker safety representative; Emil and his colleague: ask Ian by Monday whether someone in his office can help with simple questions (not through Nico, who has said he will help only with simple words). The two who reported aching backs in week 23: through the worker representative only, no names. Dan (lift records), Tomasz (crane plan, slingers), Ian (Thursday deliveries, crew hours).

3. The decision I will ask for *One sentence; who can make it; when.*

Graham, Tuesday week 26, 08:00 progress meeting: is the crane arrangement the standard for every remaining board delivery to levels 4 and 5, unless Dan or the crane operator calls a lift off on the day? Graham decides crane time, slingers and cost; it also needs Ian to confirm Thursday-afternoon deliveries and crew hours by his order deadline (ask Ian first).

4. Follow-up dates *At least days 7, 14, 21, 30: what I will check each time.*

Day 2 (Fri wk 25): Dan's lift record; stair from 08:00 until the boards are in. Day 5 (Mon wk 26): Ian's answers. Day 7 (Wed wk 26): ask Kwame whether any boards went up the stair this week. Day 6 (Tue wk 26): Graham's decision. Day 8 (Thu wk 26): crew's three questions. Days 14–15 (wk 27): records, lift-morning stair check, committee summary. Day 21 (wk 28): records, crew. Day 30 (wk 29): review with the worker representative.

5. What would show it helped *Indicators the people doing the work would recognise; baseline if I have one.*

Board trips on the core stair on each lift morning, 08:00 until the delivery is in: baseline 14 two-person trips in 20 minutes while a delivery was carried up (week 23); expect none. Every delivery lifted, or the reason it was not (Dan's records). Crew's answers: carried boards on the stair this week? Any platform work rushed? What would you change? The two who reported aches: whatever they choose to say.

6. What I will not claim *Effects my records cannot show.*

Any reduction in injuries or back pain. Any effect beyond these weeks, this crew and these records.

7. Who hears the outcome, when *People affected first.*

The crew, from Kwame (I will ask him), at a Thursday 07:30 laydown update, before the committee. Committee, week 27 (summary), and again at day 30.