



March 2, 2026

**Subject: Supporting Documentation for 2024 Safety Culture Assessment for PacifiCorp**

Enclosed is the Supporting Documentation submitted by PacifiCorp for the 2024 Safety Culture Assessment (SCA) conducted by the Office of Energy Infrastructure Safety (Energy Safety) pursuant to Public Utilities Code section 8386.2(b).

Energy Safety's resulting 2024 SCA Report for PacifiCorp, published on December 19<sup>th</sup>, 2025,<sup>1</sup> may be accessed in the 2024 Safety Culture Assessments docket (Docket #2024-SCAs).<sup>2</sup>

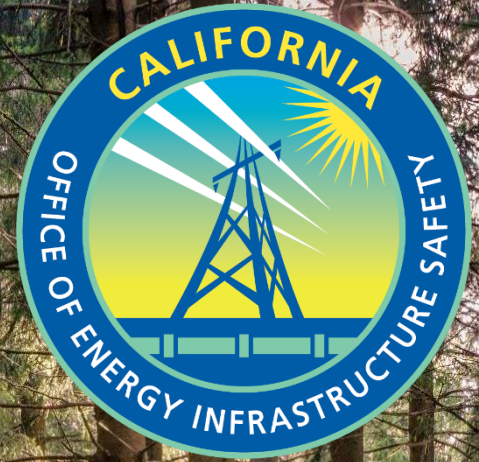
---

<sup>1</sup> 2024 SCA Report for PacifiCorp:

(<https://efiling.energysafety.ca.gov/eFiling/Getfile.aspx?fileid=59952&shareable=true>, accessed January 12, 2026).

<sup>2</sup> 2024 Safety Culture Assessments (SCAs) docket:

(<https://efiling.energysafety.ca.gov/EFiling/DocketInformation.aspx?docketnumber=2024-SCAs>, accessed December 15, 2025).



# APPENDIX C: Supporting Documentation



OFFICE OF ENERGY  
INFRASTRUCTURE  
SAFETY



# Supporting Documentation

January 2025

# PacifiCorp



## Section 2. Supporting Documentation

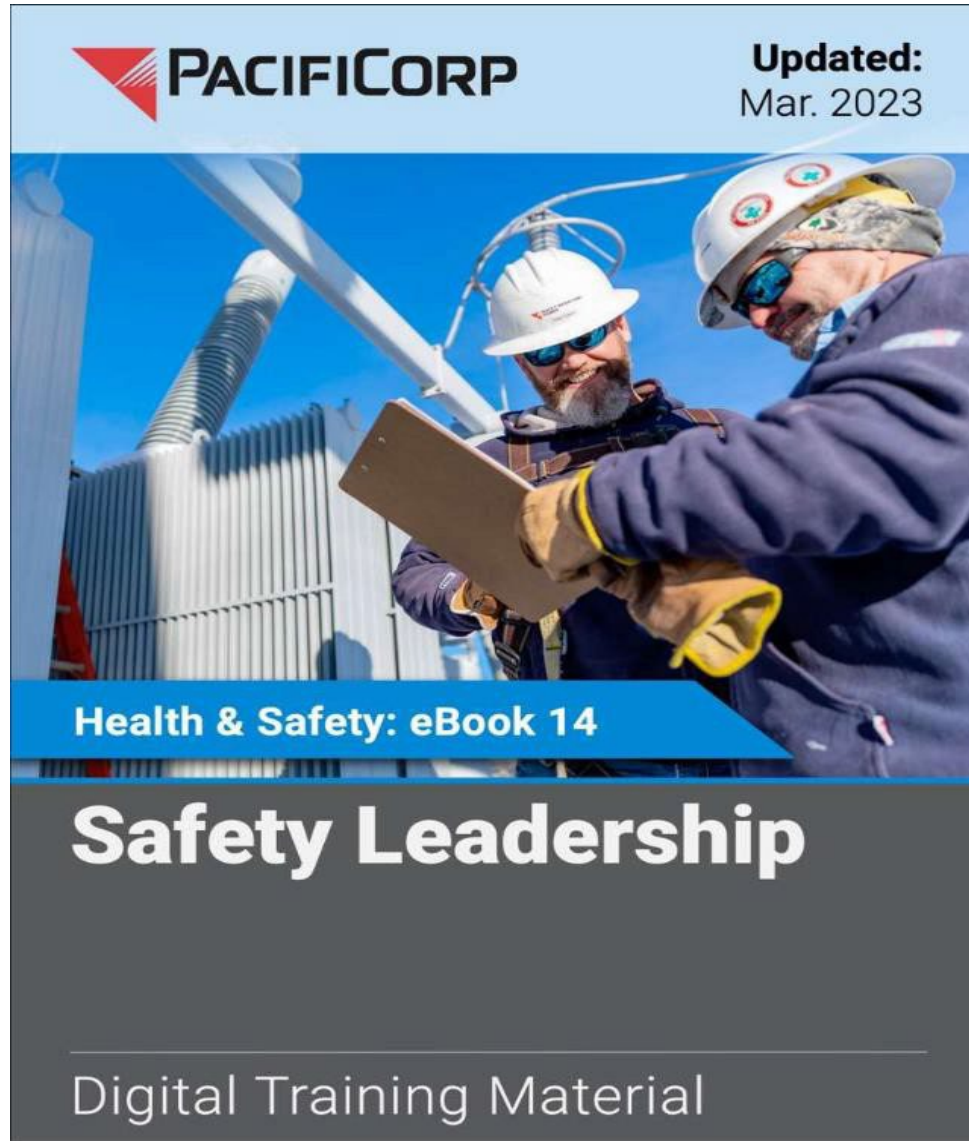
---

*The electrical corporation had the option to submit supporting documentation for the safety culture objectives and lessons learned (SCOLL). An index organized by SCOLL section and the documentation follow.*

### **Reference SCOLL Section 1.1**

1. Objective 2 – eBook Safety Leadership  
Objective 2 – eBook Manager Safety Training

Section 1.1 Objective 2 – eBook Safety Leadership



# Safety Leadership

## Table of Contents

Ab

Click the chapter or section header to navigate to that page.

### Chapter 1: Introduction

Section 1: Training Objectives (2)

Section 2: Our Core Principles (3)

Section 3: Human Performance Improvement (4)

### Chapter 2: Principles of Occupational Safety

Section 1: Safety Engineering Model (6)

Section 2: Safety Management System Model (9)

Section 3: Compliance Model (11)

Section 4: Occupational Safety Psychology 101 (13)

Section 5: Safety Processes (16)

Section 6: Knowledge Check (17)

### Chapter 3: Leadership Through Message

Section 1: Authentic, Personalized Messages (19)

Section 2: Core Safety Message (21)

Section 3: Knowledge Check (24)

### Chapter 4: Safety Observation Techniques

Section 1: Overview (26)

Section 2: Knowledge Check (32)

### Chapter 5: Feedback Techniques

Section 1: Dealing with Unsafe Behavior (34)

Section 2: Communicating on Behalf of the Company (37)

Section 3: Knowledge Check (39)

### Chapter 6: Final Review

Section 1: Final Review (41)

### Glossary

## Chapter 1

---

# Introduction

---

This eBook provides PacifiCorp employees with an overview of the field of safety and an introduction to two important leadership skills, messages and engagement.

Chapter 1 looks at training objectives related to this session.

---

**Safety Leadership**



**This eBook provides an overview of the following subjects and skills:**

- Overview of the principles of occupational safety
- Developing your safety message
- Safety observation and engagement techniques
- Dealing with unsafe behavior
- Communicating safety policy, requirements and changes on behalf of the company

**This eBook aligns with industry standards, codes and best practices through use of the following reference material:**

- Leading with Safety, Krause, Thomas. R., (2005) Wiley & Sons
- Managing Safety Performance™ Skills for Supervisors & Managers, Version 6.3, Balmert, Paul D., (2005) Balmert Consulting
- “Safety leadership” Professional Safety, 56(9), 42-49. Dunlap, E. S. (2011)
- “Effective safety leadership: Understanding types & styles that improve safety performance.” Professional Safety, 60(2), 49-53, Cooper, D. (2015)



### **CUSTOMER SERVICE**

We are focused on delivering reliability, dependability, low prices and exceptional service to our customers. We are committed to providing innovative solutions that our customers want and need.



### **EMPLOYEE COMMITMENT**

We equip employees with the resources and support they need to be successful. We encourage teamwork and provide a safe, rewarding, equitable and inclusive work environment. We make no compromise when it comes to safety and security.



### **ENVIRONMENTAL RESPECT**

We are committed to using natural resources wisely and protecting our environment for the benefit of future generations. Our Environmental RESPECT Policy details this commitment.



### **REGULATORY INTEGRITY**

We adhere to a policy of strict regulatory compliance and pursue frequent, open communication with regulators regarding our business performance.



### **OPERATIONAL EXCELLENCE**

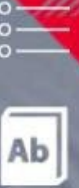
Together with our employees, we pride ourselves on excellence in every aspect of our work. Our high standards for operations and system maintenance enable us to meet and exceed our customers' expectations, perform our work safely and preserve our assets.



### **FINANCIAL STRENGTH**

We are excellent stewards of our substantial financial resources. Backed by Berkshire Hathaway, we invest in hard assets and focus on long-term opportunities that will contribute to the future strength of the company.

# Human Performance Improvement



Human Performance Improvement (HPI) is applied to all aspects of work at PacifiCorp. HPI tools apply habits of thought and action to guide critical moments and reduce error. The following are PacifiCorp's seven HPI tools:

- [Peer Checking](#)
- [Self Check \(STAR\)](#)
- [Two Minute Rule](#)
- [Stop \(Questioning Attitude\)](#)
- [Three-Way Communication](#)
- [Circle-Slash \(Place Keeping\)](#)
- [Phonetic Alphabet](#)

These **HPI tools**, referred to as PiTSTOP, are explained in depth in PacifiCorp's "HPI: PiTSTOP" eBook.

Apply the **HPI TOOL** appropriate for the job.



*Wherever this image appears, select it to display the HPI tool that relates to the content on the page.*



**P**eer Checking  
**i** Self Check (STAR)  
**T**wo Minute Rule  
**S**top (Questioning Attitude)  
**T**hree-way Communication  
**Ø** Circle-Slash (Place Keeping)  
**P**honetic Alphabet

## Chapter 2

# Principles of Occupational Safety

Chapter 2 provides a brief overview of occupational safety models and offers a foundation for understanding occupational safety by looking at five different aspects of safety in industrial operations.

**Safety Leadership**



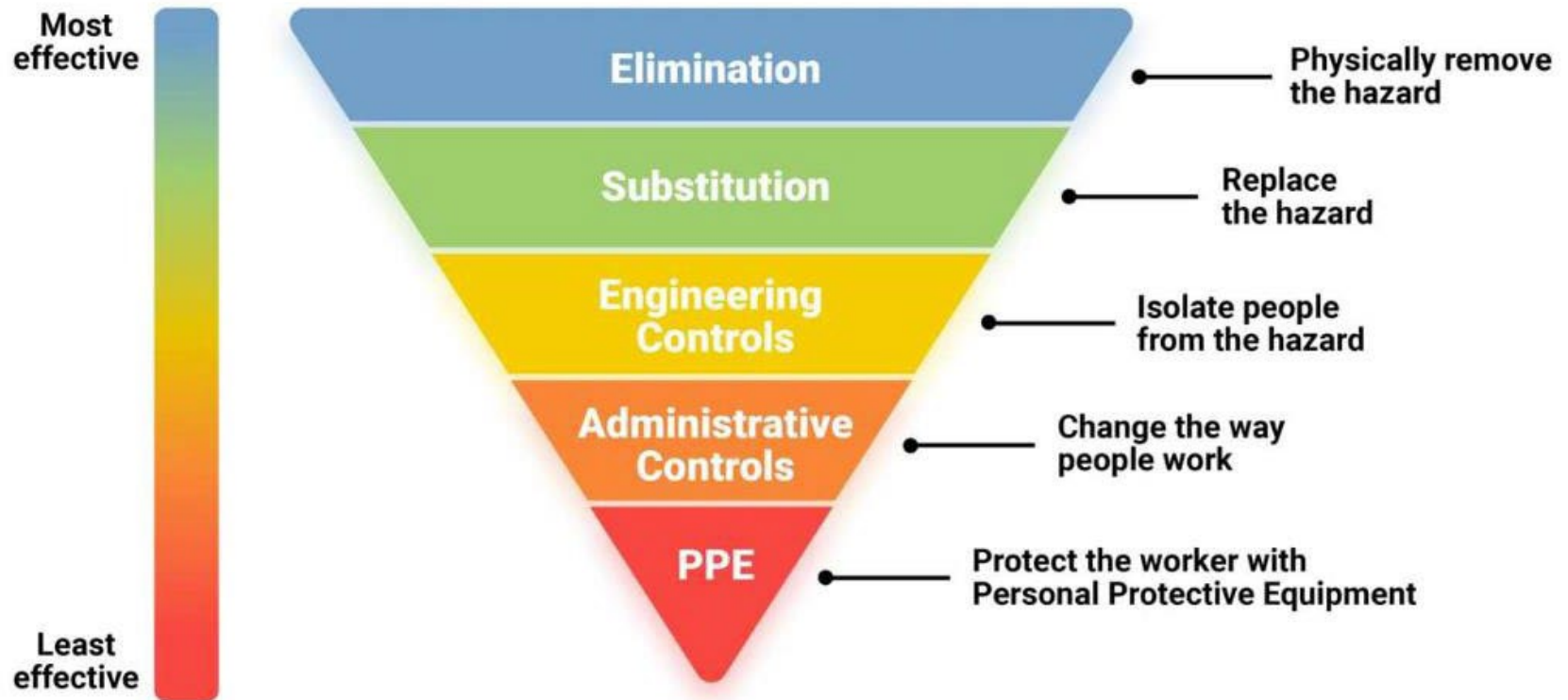


**Safety engineering** is the first principle of safety, and engineering is one of the three “E’s” in traditional occupational safety approach (along with education and enforcement). Safety engineering refers to design practices that create equipment, work environments and operational processes that eliminate or mitigate hazards.

An engineering approach to safety places less reliance on human performance to keep people safe, making it more effective than other approaches.

This principle has often been illustrated by the following “Hierarchy of Controls” model:

# HIERARCHY OF CONTROLS



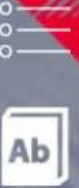
Over the decades, many hazards in the industrial workplace have been “engineered out” or made much safer through engineered controls. Occupational safety engineering advances have been achieved in virtually all electricity power delivery processes. The introduction of safer fusing and switching equipment, insulated tools and conductors, grounding systems, bucket trucks, and pneumatic-powered cutting tools are just a few examples of engineering advances. These improvements are meant to reduce risk from many different hazards such as high voltage, arc flash, falling and body strain.

Engineering continues to be important to safety today. As new challenges emerge, the hierarchical approach and the effort to design safer tools, systems and future processes remains the first principle in safety.



Safer switching equipment is an example of engineering advances.

# Safety Management System Model



Despite past safety engineering advancements, hazards must continue to be identified and managed on a day-to-day basis. The ways in which an organization manages safety can be described as their safety management system (SMS). Established standards describe the essential elements of an effective SMS, and these standards can offer insights into the principles of occupational safety. Two of these standards are the **Occupational Safety and Health Administration (OSHA)** Voluntary Protection Program (VPP) and the International Standards Organization (ISO) 45001 “Occupational Health and Safety Management Systems.”

To qualify for VPP, employers must operate a comprehensive safety and health management system that includes four essential elements.

These elements, when integrated into a worksite’s daily operations, can reduce the incidence and severity of illnesses and injuries:

- Management leadership and employee involvement
- Worksite analysis for hazard assessment
- Hazard prevention and control
- Safety and health training

VPP participation process involves the use of an audit that delves deeply into sub-elements of each of the above.

The ISO Standard 45001:2018 was developed by ISO with the input of experts from more than 70 countries and has an accompanying certification process. This standard includes the following elements:

- **Context of the Organization:** Considering the business requirements, hazards, cultural challenges and worker needs
- **Leadership:** Commitment at all management levels, clear policy and responsibilities
- **Planning:** Assessing hazards and opportunities to eliminate hazards, reduce risks, and adapt work, work organization and work environment to workers

- **Support:** Ensuring the necessary resources, competence, awareness, communication is in place to achieve health and safety goals
- **Operation:** Eliminating risks, performing work to standard and management of change
- **Performance Evaluation:** Documentation as evidence of SMS execution, effective metrics, audits and compliance
- **Improvement:** Incident and near miss learning, corrective action and continuous improvement

The VPP and ISO 45001 standards are periodically updated to stay current to modern challenges. Regardless of whether an organization chooses to join the VPP program or certify under ISO 45001, these standards offer important benchmarks when considering strategy and approach to occupational health and safety.

## Section 3

# Compliance Model



Regulatory compliance is another aspect of occupational safety. The Occupational Safety and Health Act, which went into effect in 1971, mandates that employers provide a safe and healthful work environment. Since this law was enacted, OSHA has enacted many individual workplace safety and health standards, such as the Electric Power Generation, Transmission and Distribution standard of 1994 (1910.269). To be effective, employers must move their safety programs beyond mere compliance with OSHA rules, but these rules continue to present a baseline for health and safety efforts.

Compliance is key to maintaining a safe environment.

## OSHA Versus EPA

OSHA establishes standards and obligates employers to determine how best to comply as they carry out business operations. To understand how OSHA works, it is useful to compare them to the [Environmental Protection Agency \(EPA\)](#).

The EPA has the authority to prohibit activities that release contaminants into the environment and can require operators to obtain permits prior to conducting these activities. OSHA does no such permitting. Instead, employers must determine how best to comply with regulations.

The enforcement wing of the agency monitors workplaces and issues citations when they believe an employer has violated a standard. OSHA sets standards aimed at prevention of illness and injury and expects the employer to implement a program that complies. OSHA then monitors the workplace, performing inspections according to a schedule as well as in response to complaints or serious incidents. They issue citations which are subject to appeal.

As a result of a focus on the employers' individual strategies for compliance, the compliance approach of one employer often differs from that of another employer. When an employer identifies safety and health requirements, they are obligated to ensure the organization complies. OSHA can even issue a citation if the employer does not follow their own rules.

OSHA readily acknowledges that their rules alone do not create a safe workplace. Because of this, OSHA has numerous non-regulatory and non-enforcement activities aimed at supporting employers and workers in partnership with a common goal of keeping everyone safe.



### Video 2.1 Occupational Safety

Play this video to learn about occupational safety.

In recent decades, behavioral and organizational psychologists have contributed significantly to understanding and improving occupational safety. It had become apparent that it was not enough to simply engineer, educate and enforce (the “Three E’s” of traditional safety).

A better understanding of how humans think and behave has allowed for further improvement of work processes, safety programs, training and safe work performance. Psychologists and other allied professionals help organizational leaders and the safety profession accomplish these improvements.

In the 1990’s, **behavior-based safety (BBS)** emerged. This approach centered on an observation technique that sought to lower a “do’s and don’ts” stigma of safety and ask real questions about the manner of work chosen by a worker.



In BBS observation, work is observed and then any perceived risks are discussed between the worker and the observer. Improvements to behavior and workplace design are accomplished by understanding how and why a person adapts their approach, i.e. behavior, to the demands of the work, sometimes opting for unacceptable levels of risk. The observation technique is done without enforcement and/or confrontation. Most safety observation programs today do not follow a strict BBS approach, but BBS made its mark on safety.

Industrial and organizational psychology has also contributed greatly to occupational safety. This field approaches safety in its cultural respect, and looks not only at behaviors, but also the attitudes and values existing at all levels of an organization that result in system failures or that otherwise impact the effectiveness of safety programs. By addressing safety culture, the organizational psychology approach can lead to improvements to underlying characteristics of an organization that result in longstanding improvements to health, safety and overall excellence of an organization.

Another contribution to occupational safety has occurred through application of **human performance improvement (HPI)**. HPI draws from several disciplines, including psychology, organizational development, process improvement and instructional design. At PacifiCorp, HPI has been introduced through the promotion of a selection of seven human performance tools, which together are referenced by the **"PITSTOP"** acronym:

**P**eer Checking  
**i** Self Check (STAR)  
**T**wo Minute Rule  
**S**top (Questioning Attitude)  
**T**hree-way Communication  
~~Ø~~ Circle-Slash (Place Keeping)  
**P**honetic Alphabet



PacifiCorp encourages employees to keep HPI tools close by.

Further implementation of HPI approaches and tools is ongoing. The process is built on the interest and commitment of individuals in the organization who are supported with resources and enabled to promote this process. Refer to the "HPI: PITSTOP" eBook for more information on HPI at PacifiCorp.

# Section 5

## Safety Processes



Learning about occupational safety also happens by looking at safety processes in the workplace. A company's safety program is made up of individual programs and processes. The Health and Safety page on the PacifiCorp website provides an overview of various safety processes. Here are a few that should be familiar:

- Policies and procedures
- Safety manuals
- Safety Committee
- Training
- Tailboards (job briefings)
- Accident investigation
- Crew visits/observations
- Workplace inspections



Safety meetings are an important safety process.

- Safety meetings
- Safety bulletins/communications
- Incident reporting
- Personal protective equipment (PPE)

Question 1 of 5

**Safety engineering is the first principle of safety.**

- A.** True.
- B.** False.

Check Answer

Question 2 of 5

**Which of the following are elements of the ISO Standard 45001? Select all that apply.**

- A.** Planning.
- B.** Management.
- C.** Operation.
- D.** Leadership.

Check Answer

Question 3 of 5

**Who is responsible for determining how best to comply with OSHA regulations?**

- A.** OSHA.
- B.** Employees.
- C.** Employers.
- D.** State government.

Check Answer

Question 4 of 5

**What is the acronym for the HPI tools PacifiCorp uses?**

- A.** STOPOFF.
- B.** PITSTOP.
- C.** STAR.
- D.** GOAL.

Check Answer

Question 5 of 5

**A company's safety program is made up of a single, large program.**

- A.** True.
- B.** False.

Check Answer

## Chapter 3

# Leadership Through Message

Chapter 3 provides an overview of how leaders should communicate with their employees about the importance of safety.

**Safety Leadership**



# Authentic, Personalized Messages



At some point, all leaders in an operations environment will find a need to underscore the importance of safety in a message to their team. The quality and effectiveness of a message comes from an effort to consider what is important to say and what might give a message impact.

One way in which messages are strong is when listeners know why the subject is important to the speaker. A leader's own experiences, values and perspectives inform their safety viewpoint and form their credibility on the subject. It is through personalized statements, or stories, that a leader can convey to others the importance of safety.

### Apply the **HPI TOOL** **SELF CHECK**



*Leaders should ask themselves why safety is important to them and use their own experience to teach employees about safety.*



Despite efforts to make a workplace inherently safe or to enforce rules, the presence of risk remains in the workplace. A work team must be asked to participate in ensuring the safety of a job. This "ask" is much more effective when the importance of safety resonates in the asking.



**BRETT ADAMS**  
AREA OPERATIONS MANAGER

**Video 3.1 Safety Leadership Communication**

Play this video to learn more about safety leadership communication.

This chapter is intended to lead readers through a process that considers an effective safety message. The goal is to have the ingredients for a “stump speech” or set of ready-to-go talking points that can be used as opportunities present themselves.

## How Safety Standpoints are Formed

A first step in considering a personalized and compelling message about safety is to consider what composes a safety standpoint. Here are a few things that are expected to influence a person’s viewpoints on safety:

- Personal injury or near miss experience
- Personal successes or failures with managing risk safely
- Experience with testing physical limits
- The injury or near miss experience of a family member, friend or coworker
- Workplace safety successes and failures
- Personal values around risk-taking and safety (through upbringing or experience)



### Video 3.2 Constructive Feedback Overview

Play this video to learn more about constructive feedback.

Below is an outline that may be useful in a safety message that builds off authentic, personal safety values:

1. A good opening
  - a. Start with a simple statement of personal belief on the importance and value of working safely. Use words or phrases that can comfortably be used repeatedly. This first statement lays the groundwork for other key points specific to the issue at hand.

2. Reminder of the importance of working safely
  - a. This could be one or two examples that are widely agreed upon as being important.
3. The safety goals of the organization
4. Personal remarks to the employees
  - a. Good leaders know their employees well enough that they can say things that relate to their personal lives and reinforce the importance of safety.
5. Key points on the topic at hand
  - a. Here are some types of topics that need to be communicated:
    - i. Recently recognized hazards, new or revised policies, safety program announcements, training subjects, compliance issues, new safety tools or issues with safety tools, or the status of safety projects
    - ii. Regardless of the topic, be sure to address why it is important to successfully working safely.
6. Concluding message
  - a. Consider a conclusion that can comfortably be used repeatedly.
    - i. An example of a more generalized message is: "Please remember that no job is so important that we can't take time to do it safely."
    - ii. An example of a message that emphasizes a specific action that is part of working safely is: "Be safe out there and please remember to make the most of your tailboard talks."

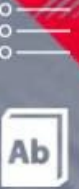
This is one approach that may make it easier to build an effective safety message. It may also make it easier to address pushback. For instance, if an organization knows safety is the right thing to do and places high value on safe acts, how does a safety leader address the skepticism of this value among a work team? Part of the answer lies in the personal credibility of the leader.

When the leader comes to terms with why safety is important to them and takes an honest, personally driven approach, the work team will know their message is backed by core values. The leader may not always be able to reduce skepticism, but a personalized approach can keep from adding to it. An individual's personal value of safety is foundational to their ability to be a safety leader.



# Section 3

## Knowledge Check



Question 1 of 3

**Which of the following informs a leader's safety viewpoint? Select all that apply.**

- A.** Personal experiences.
- B.** Personal taste.
- C.** Personal values.
- D.** Personal perspectives.

Check Answer

Question 2 of 3

**Which of the following is not part of the outline for an authentic, personalized safety message?**

- A.** A good opening.
- B.** Key points on the topic at hand.
- C.** Concluding message.
- D.** Reminder of the work done by the company.

Check Answer

Question 3 of 3

**An individual's personal value of safety is foundational to their ability to be a safety leader.**

- A.** True.
- B.** False.

Check Answer

## Chapter 4

# Safety Observation Techniques

Chapter 4 provides a brief overview of the safety observation techniques that form part of the crew visit process.

**Safety Leadership**



# Section 1

## Overview



**BEN DENFELD**  
SENIOR SAFETY ADMINISTRATOR

### Video 4.1 Safety Observation Techniques

Play this video to learn more about safety observation techniques.

It can be frustrating to supervisors when there is little time in schedules to get out and be present at the job sites of their work teams. It is important that when managers and other safety leaders have the time to visit job sites, they make it count.

The operational and supervisory objectives of managers' job site visits are important and too numerous to describe here, but among them is to look at the safety of the job. This chapter is intended to help safety leaders familiarize themselves with safety observation techniques so they can take full advantage of safety observation opportunities.

One safety observation technique is to be collaborative and respectful. A misunderstanding can exist within the workforce that safety observations are intended to catch people doing something incorrectly for the purpose of discipline. It is important to dispel this notion if it exists and to foster a collaborative and respectful atmosphere in the observation process.



Another safety observation technique is to focus on the importance of feedback and conversation. Most of the value from an observation comes from the immediate engagement with the crew. It is important to set the stage for a constructive conversation and to provide feedback in a positive and concerned manner. Sometimes, observations indicate significant risk or lack of expected safety measures, and while these can be difficult conversations, they should not be avoided.

[Chapter 5, Section 1](#) offers one approach called the **SORRY Method**.

In addition to providing feedback, conversation about the safety of the work involves listening to concerns. Discussions right in front of the work are effective at identifying concerns with safety tools and procedures and learning what team members see as solutions.

## Paired Safety Observations

Paired safety observations have proven to be particularly effective at meeting the goals of a safety observation. Having two observers allows the observers to develop and validate their observations, discussing the hazards and the effectiveness of controls. Together, a safety administrator and manager, or foreman and manager, can encourage collaboration and a respectfulness of the process. The benefit of consensus between the two observers also helps during feedback and conversation.

## Checklist Approach with Situational Scanning

It can be very useful to the safety effort to evaluate work against a set of safety criteria. Because it can be difficult to remember all the criteria, observation programs often include a checklist. Checklists usually come in the form of cards, small booklets or apps on a phone. The following is an example of an observation checklist with over thirty criteria under seven categories, which has been used (with slight variations) for a vast majority of safety observations within the utility industry:

1. Body positioning
  - a. Line of fire, pinch points and obstructions, eyes on path, eyes on work
2. Body use and ergonomics
  - a. Lifting/lowering, working body position, pushing/pulling excessive force, repetitive motion risk factors
3. Tools and equipment
  - a. Use and selection, condition, cranes/rigging, ladders/scaffolding
4. Procedures
  - a. Switching, isolation, testing and grounding; tailboard; confined space, etc.
5. PPE
  - a. Head, eyes and face, hand, hearing, fall protection, foot, clothing, respiratory
6. Work environment
  - a. **Walking-working surfaces**, housekeeping, lighting, barricades, signage
7. Communication
  - a. Discussing work to be completed, assigning tasks, etc.

As a complement to using checklist criteria to systematically observe work, **situational scanning** involves simply watching the activity and asking basic questions such as:

- What hazards are visible?
- How could someone get hurt?
- What is keeping the workers safe?
- What kind of injury could occur?
- What is working well?
- What could be improved?



Ensure employees are working safely.

## SIF Precursor Field Engagement

The SIF Precursor observation technique identifies potential precursors to significant injuries and fatalities (SIFs). The goal with this method is to identify and eliminate the potential for life-altering or life-ending events. The technique employs a scheme of 13 SIF precursors that have been tested by utility teams and implemented by some utilities.

Training on the SIF Precursor observation technique is available from the PacifiCorp Health and Safety Department.

Precursors	Deficiency present?	Weight
Safe Work Procedure		3
Hazard Recognition		2
Departure from Routine		3
Plan to Address Change		1
Safety Attitudes		1
Rules and Procedures		3
Familiar with the Task		2
Risk Normalization		3
Productivity Pressure		3
Perceived Safety Culture		3
Stop Work Execution		2
Workers Inactive in Safety		2
Pre-Task Plan		3
<b>Total Weighted Score</b>		

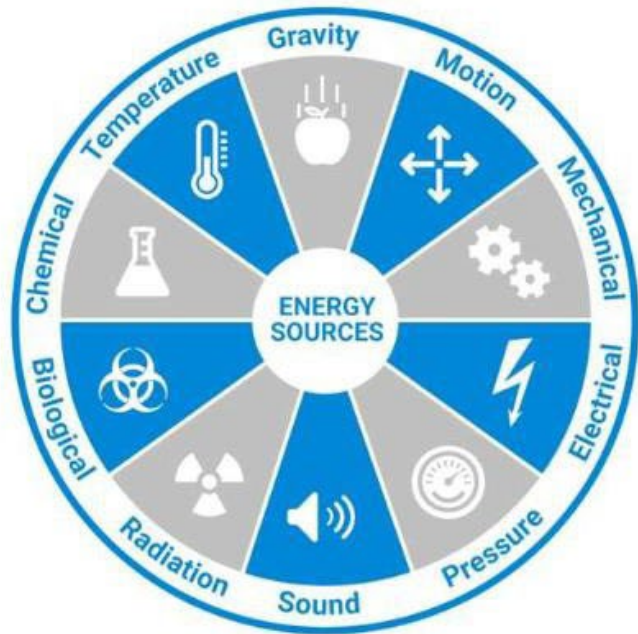


## Hazardous Energy Control Assessment

Recently, an additional tool with the goal of eliminating serious injuries and fatalities has been developed, which is called the Hazardous Energy Control Assessment.

This observation technique is based on the fact that the release or loss of control of high energy sources in a work environment are what causes SIFs. A scheme of common high energy sources, such as the ones shown on the “Energy Wheel” on the next page, is used as a reference.

During an observation, high energy sources are identified and evaluated for the presence of a direct control. A **direct control** is defined as one that targets the high energy, is completely effective when installed, verified and used properly, and is not vulnerable to human error. Direct controls are considered effective and adequate for reducing energy exposure so that it cannot cause an SIF.



Energy Wheel.

The results of these observations offer a work monitoring tool and help to identify aspects of utility work that need more effective direct controls. This method can be done in conjunction with other crew visit methods.



**Video 4.2 Work Observation Techniques**

Play this video to learn more about work observation.



Fall protection is an example of a direct control.

# Section 2

## Knowledge Check



Question 1 of 4

**Which of the following are safety observation techniques? Select all that apply.**

- A.** Try to catch people doing something wrong.
- B.** Be collaborative and respectful.
- C.** Focus on the importance of feedback and conversation.
- D.** Perform crew visits daily to ensure safety.

Check Answer

Question 2 of 4

**How many observers are involved in a paired safety observation?**

- A.** Two.
- B.** Three.
- C.** Four.
- D.** Five.

Check Answer

Question 3 of 4

**Which of the following is not a checklist category for observations?**

- A.** Procedures.
- B.** Tools and equipment.
- C.** Employees involved.
- D.** Work environment.

Check Answer

Question 4 of 4

**A direct control is vulnerable to human error.**

- A.** True.
- B.** False.

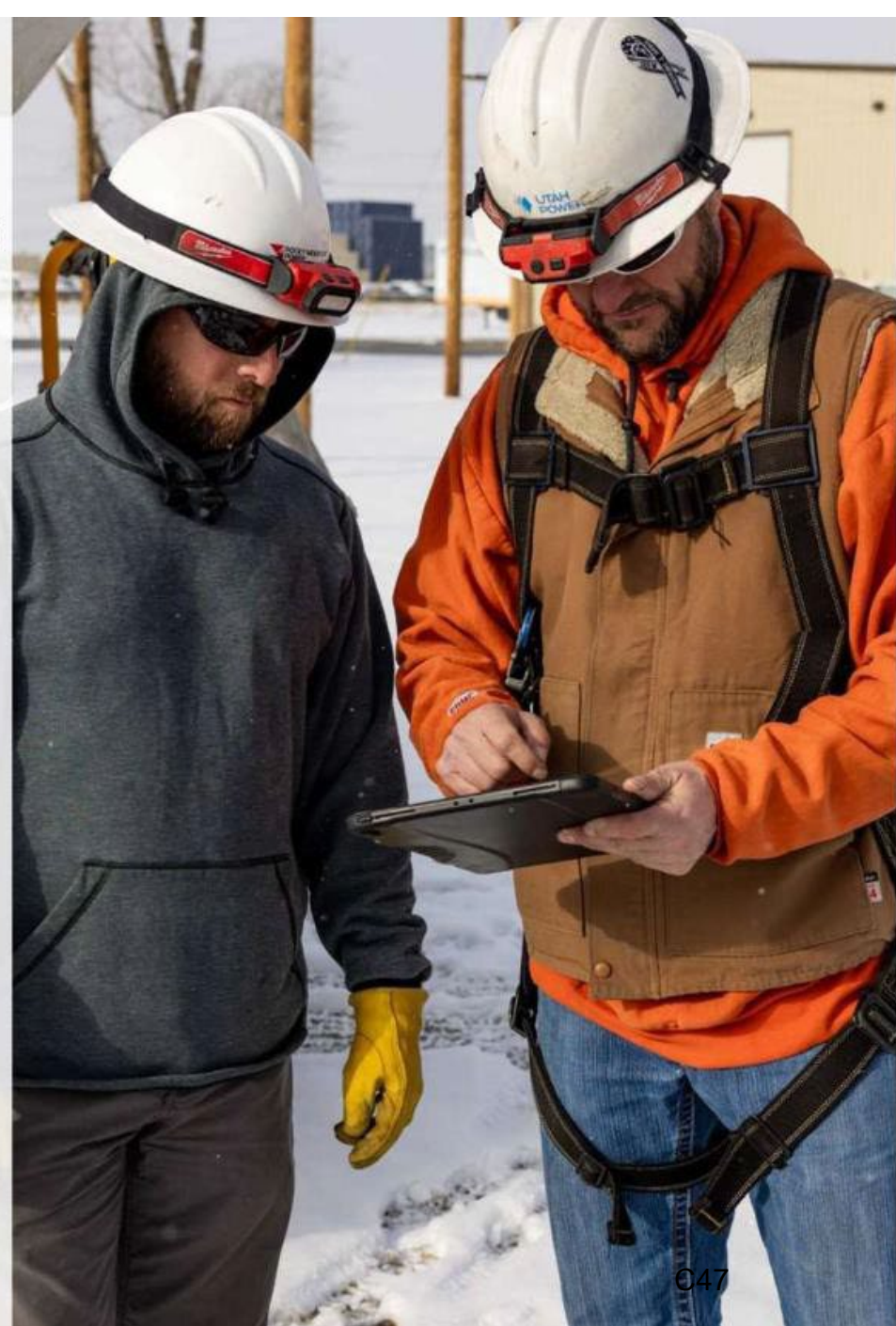
Check Answer

## Chapter 5

# Feedback Techniques

Chapter 5 provides an overview of how leaders should provide employees with constructive feedback.

**Safety Leadership**





### Video 5.1 Feedback Overview

Play this video to learn how to give feedback.

Dealing with coworkers and team members who are not working safely is necessary, but not always easy. It helps knowing that the intervention is being done for the right reasons, based on personal concern for the individual.

Having established and well-communicated work expectations also helps, as well as following a familiar structure for the process. The SORRY Method is one simple, five-step method to deal with the individual and the situation.

## SORRY Method

1. **Step 1:** State the reason for making the observation.
  - a. "I came over to check on how this job is going."
2. **Step 2:** Describe the behavior observed.
  - a. "I saw that you were not wearing safety glasses and put them on when you saw me."

3. **Step 3:** State the requirement.
  - a. "As you know, gloves, hardhat, and safety glasses are required in this area."
4. **Step 4:** Ask for the reasons why the rule is not being followed.
  - a. Questions engage people by getting them involved and making them think. In the case of unsafe behavior, asking the question "Why?" and waiting for an answer turns out to be the most powerful part of the process.
  - b. "So, help me understand, what are the reasons why you are performing this repair, but not wearing your protective eyewear?"




Always provide feedback in a respectful manner.

5. **Step 5:** Tell the employee what can happen to them if they do not follow the safety practice.
  - a. "Your eyewear protects you from what you do not expect. Yesterday, I read a report about an accident where someone had material sprayed in their face when an adjacent line began leaking. Accidents like that do happen."

In summarizing the five steps, they add up to SORRY:

- **S:** State the reason for making the observation.
- **O:** Describe the behavior observed.
- **R:** State the requirement.
- **R:** Ask for the reasons why the rule is not being followed.
- **Y:** State what can happen if the requirement is not followed.

The SORRY method can also be used to recognize safe behavior. Instead of “R” reasons why, “R” recognizes their effort.



**LONNIE HOGGARD**  
OPERATIONS MANAGER

**Video 5.2** Feedback Techniques

Play this video to learn more about feedback techniques.

**Note:** Another opportunity for building skills with difficult conversations is to take advantage of company training on the subject. One training program in the PacifiCorp learning system is called “Crucial Conversations.” Training offerings are based on demand, so it is worth inquiring with the training department about them.



# Communicating on Behalf of the Company



Leaders routinely need to communicate policy or procedure on behalf of the organization.

When covering an incident brief or a safety information bulletin (SIB) with a work team, the leader's job is not just to communicate the policy. Their role as supervisor is to manage execution: to convert the policy into action. This means the goal for a message covering policy or procedure is to have every member of the team walking out of the session fully committed to following the new procedure. This requires a dedicated effort to communicating effectively.

A message to the work team is an opportunity for making the execution of the policy or procedure easier. The closer the message gets to making impact, the easier the subsequent effort to oversee the adoption of change or execution of a practice.

A video thumbnail showing a man, Rich Buelte, sitting at a desk in an office. He is wearing a dark blue long-sleeved shirt with a small logo on the chest. The background shows office shelves with various items and papers. A semi-transparent black box at the bottom of the video frame contains the text 'RICH BUELTE OPERATIONS MANAGER' in white.

**RICH BUELTE**  
OPERATIONS MANAGER

**Video 5.3** How to Communicate on Behalf of the Organization

Play video to learn to communicate for the company.

The farther away a message is from making impact, the more work there is to improve safety. Execution is far easier when the team has bought into the policy or expected practice. Buy-in reduces time spent in the follow-up and enforcement mode.

Getting buy-in requires two critical actions on the part of the safety leader.

First, the leader must explain the reasons for the change in policy or procedure. Lay the groundwork by determining how compliance with the requirements is to be accomplished. If the incident brief or SIB does not explain why it is being issued, spend a few minutes with a manager or safety administrator to find out why. The explanation is seldom complicated, and, in the case of safety, the reason for the requirement helps sell the change. Sometimes, the supervisor just assumes the reason is obvious, but pointing out the obvious is important to do.

Next, a leader must focus on what needs to be done to implement the policy. There are bound to be issues with implementation of a requirement. Once the purpose of the change has been explained and the details communicated, turn the discussion to the question: "How are we going to make the new policy work?"

## Apply the **HPI TOOL** **PEER CHECKING**



*Work with team members to find solutions for successful executions of new policies and procedures.*



Solicit the ideas and issues from the team and assign follow-up where needed. If the change requires stocking new equipment or forms, performing an additional check or a new approval process, these details need to be addressed. Having the answers in advance can help, but it is important to also be open to initial reactions from the team upon hearing the news. Often, they have solutions for a successful execution, and this conversation can instill ownership by the team in the process.

It is important to bear in mind that the organization depends on leaders to implement the change successfully and completely.

Question 1 of 3

**What is the first step in the SORRY method?**

- A.** Describe the behavior observed.
- B.** State the requirement.
- C.** State the reason for making the observation.
- D.** Ask for the reasons why the rule is not being followed.

Check Answer

Question 2 of 3

**Leaders routinely need to communicate policy or procedure on behalf of the organization.**

- A.** True.
- B.** False.

Check Answer

## Section 3

# Knowledge Check



Question 3 of 3

**Which of the following are actions a leader must take to get buy-in for new policies and procedures?  
Select all that apply.**

- A.** Explain what the employees are doing incorrectly.
- B.** Explain the reasons for the change in policy or procedure.
- C.** Focus on who is performing actions incorrectly.
- D.** Focus on what needs to be done to implement the policy.

Check Answer

## Chapter 6

---

# Final Review

---

This Final Review gives individuals a chance to test knowledge of the most important takeaways from this session.

---

**Safety Leadership**



Take this final review quiz to assess your knowledge.

Question 1 of 15

**Safety engineering is the first principle of safety.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 2 of 15

**Which of the following are elements of the ISO Standard 45001? Select all that apply.**

- A.** Planning.
- B.** Management.
- C.** Operation.
- D.** Leadership.

Check Answer

## Section 1

# Final Review



Take this final review quiz to assess your knowledge.

Question 3 of 15

**Who is responsible for determining how best to comply with OSHA regulations?**

- A.** OSHA.
- B.** Employees.
- C.** Employers.
- D.** State government.

Check Answer

## Section 1

# Final Review



Take this final review quiz to assess your knowledge.

Question 4 of 15

**What is the acronym for the HPI tools PacifiCorp uses?**

- A. STOPOFF.**
- B. PiTSTOP.**
- C. STAR.**
- D. GOAL.**

Check Answer

## Section 1

# Final Review



Take this final review quiz to assess your knowledge.

Question 5 of 15

**A company's safety program is made up of a single, large program.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 6 of 15

**Which of the following informs a leader's safety viewpoint? Select all that apply.**

- A.** Personal experiences.
- B.** Personal taste.
- C.** Personal values.
- D.** Personal perspectives.

Check Answer

# Section 1

## Final Review



Take this final review quiz to assess your knowledge.

Question 7 of 15

**Which of the following is not part of the outline for an authentic, personalized safety message?**

- A.** A good opening.
- B.** Key points on the topic at hand.
- C.** Concluding message.
- D.** Reminder of the work done by the company.

Check Answer

Take this final review quiz to assess your knowledge.

Question 8 of 15

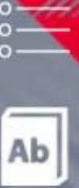
**An individual's personal value of safety is foundational to their ability to be a safety leader.**

- A.** True.
- B.** False.

Check Answer

# Section 1

## Final Review



Take this final review quiz to assess your knowledge.

Question 9 of 15

**Which of the following are safety observation techniques? Select all that apply.**

- A.** Try to catch people doing something wrong.
- B.** Be collaborative and respectful.
- C.** Focus on the importance of feedback and conversation.
- D.** Perform crew visits daily to ensure safety.

Check Answer

Take this final review quiz to assess your knowledge.

Question 10 of 15

**How many observers are involved in a paired safety observation?**

- A.** Two.
- B.** Three.
- C.** Four.
- D.** Five.

Check Answer

Take this final review quiz to assess your knowledge.

Question 11 of 15

**Which of the following is not a checklist category for observations?**

- A.** Procedures.
- B.** Tools and equipment.
- C.** Employees involved.
- D.** Work environment.

Check Answer

Take this final review quiz to assess your knowledge.

Question 12 of 15

**A direct control is vulnerable to human error.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 13 of 15

**What is the first step in the SORRY method?**

- A.** Describe the behavior observed.
- B.** State the requirement.
- C.** State the reason for making the observation.
- D.** Ask for the reasons why the rule is not being followed.

Check Answer

## Section 1

# Final Review



Take this final review quiz to assess your knowledge.

Question 14 of 15

**Leaders routinely need to communicate policy or procedure on behalf of the organization.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 15 of 15

**Which of the following are actions a leader must take to get buy-in for new policies and procedures?  
Select all that apply.**

- A.** Explain what the employees are doing incorrectly.
- B.** Explain the reasons for the change in policy or procedure.
- C.** Focus on who is performing actions incorrectly.
- D.** Focus on what needs to be done to implement the policy.

Check Answer

Click the blue text below each term to view the term in context.

## B

### **Behavior-Based Safety (BBS)**

A safety approach in which the behavior of people are observed as well as the effects of their behavior.

[Chapter 2, Occupational Safety Psychology 101](#)

## C

### **Circle-Slash (Place Keeping)**

A human performance tool in which a worker uses a place keeping technique to check off steps in a process. In this technique, circle the step to be completed and read aloud. Perform the step. Draw a slash through the circle of the step once it has been completed. Move on and circle the next step, repeating this method again until all steps have been completed.

[Chapter 1, Human Performance Improvement](#)

## D

### **Direct Control**

A control that targets the high energy source, is completely effective when installed, verified and used properly, and is not vulnerable to human error.

[Chapter 4, Overview](#)

## E

### **Environmental Protection Agency**

A federal agency of the United States government that regulates environmental protection.

[Chapter 2, Compliance Model](#)

Click the blue text below each term to view the term in context.

## H

### **Human Performance Improvement (HPI)**

A program implemented at organizations to prevent unintentional human error.

[Chapter 2, Occupational Safety Psychology 101](#)

### **Human Performance Improvement (HPI) Tools**

A collection of concepts and techniques meant to reduce the chance of error in work, and to detect and improve upon organizational weaknesses that increase the chance of error.

[Chapter 1, Human Performance Improvement](#)

## O

### **Occupational Safety and Health Administration (OSHA)**

A federal agency of the United States government that regulates workplace safety and health.

[Chapter 2, Safety Management System Model](#)

## P

### **Peer Checking**

A human performance tool in which a knowledgeable peer observes or checks the behavior of the performer prior to the action being taken to prevent errors.

[Chapter 1, Human Performance Improvement](#)

[Click the blue text below each term to view the term in context.](#)

## Phonetic Alphabet

A human performance tool in which workers engage in a communication technique to ensure letters are understood by using corresponding words for the letters in question (Alpha for A, Bravo for B, etc.).

[Chapter 1, Human Performance Improvement](#)

## PiTSTOP

An acronym developed by PacifiCorp to help employees remember the seven key HPI tools.

[Chapter 2, Occupational Safety Psychology 101](#)

## S

## Safety Engineering

The design of equipment, work environment and operational processes so that hazards are either eliminated or controlled.

[Chapter 2, Safety Engineering Model](#)

## Self Check (STAR)

A human performance tool in which a worker reflects on the acronym STAR to help focus their attention on the task at hand. STAR stands for Stop, Think, Act and Review. Stop and pause prior to performing critical steps. Think and focus attention on the step to be performed. Act and perform the intended step. Review and verify that the anticipated outcome of the step completed is as expected.

[Chapter 1, Human Performance Improvement](#)

## Situational Scanning

A safety observation technique in which the observer simply watches the activity and asks basic questions.

[Chapter 4, Overview](#)

[Click the blue text below each term to view the term in context.](#)

## **SORRY Method**

A five-step method to deal with an individual and their unsafe behavior. SORRY stands for: **S**: State the reason for making the observation. **O**: Describe the behavior observed. **R**: State the requirement. **R**: Ask for the reasons why the rule is not being followed. **Y**: State what can happen if the requirement is not followed.

[Chapter 4, Overview](#)

## **Stop (Questioning Attitude)**

A human performance tool in which a worker stops and gets help whenever a question is encountered and their response to it is uncertain.

[Chapter 1, Human Performance Improvement](#)

## **T**

### **Three-Way Communication**

A human performance tool in which workers engage in a technique to ensure communications are understood correctly prior to an action being taken. In this communication technique, a sender establishes initial contact with a receiver, and the sender clearly states the message. The receiver repeats the message in their own words, repeating critical details (equipment name, number, position, etc.) verbatim—word for word. If the message is correct, the sender acknowledges that the receiver's response is correct. If any uncertainty or confusion develops, stop and start over.

[Chapter 1, Human Performance Improvement](#)

Click the blue text below each term to view the term in context.

## Two Minute Rule

A human performance tool in which a worker takes time to observe a job site upon arrival to identify and resolve any abnormal conditions or safety hazards.

[Chapter 1, Human Performance Improvement](#)

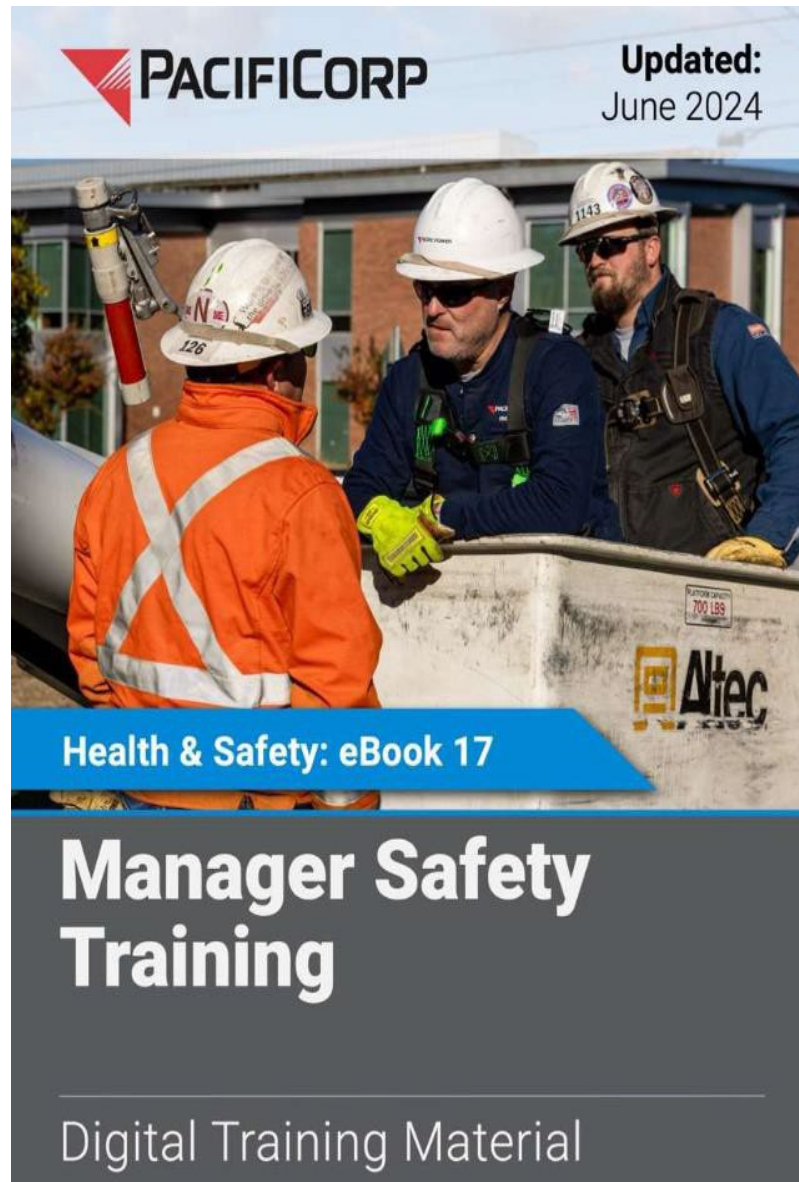
## W

## Walking-Working Surface

Any surface where walking and working are done, like floors, aisles, stairs, ladders, roofs and platforms.

[Chapter 4, Overview](#)

Section 1.1 Objective 2 – eBook Manager Safety Training



# Manager Safety Training

## Table of Contents

PACIFIC  
POWER



Click the chapter or section header to navigate to that page.

### Chapter 1: Introduction

- Section 1: Training Objectives (2)
- Section 2: Our Core Principles (3)
- Section 3: Human Performance Improvement (4)

### Chapter 2: Overview

- Section 1: Training Objectives (6)
- Section 2: Responsibilities of Managers (8)
- Section 3: Management Roles (10)
- Section 4: Knowledge Check (16)

### Chapter 3: Website

- Section 1: Intranet Use for Health and Safety (18)
- Section 2: MSDSONline (20)
- Section 3: Knowledge Check (23)

### Chapter 4: Accidents and Incidents

- Section 1: Notification (25)
- Section 2: AWAIR (28)
- Section 3: Forms (31)
- Section 4: OSHA Recordables (38)
- Section 5: Knowledge Check (42)

### Chapter 5: Crew Visits

- Section 1: Purpose (44)
- Section 2: Documentation (47)
- Section 3: Knowledge Check (48)

### Chapter 6: Safety Training

- Section 1: Overview (50)
- Section 2: Knowledge Check (56)

# Manager Safety Training

## Table of Contents

PACIFIC  
POWER



### **Chapter 7: OSHA**

Section 1: Posting (58)

Section 2: Policies (60)

Section 3: OSHA Visits (62)

Section 4: Knowledge Check (67)

### **Chapter 8: Final Review**

Section 1: Final Review (69)

### **Glossary**

## Chapter 1

# Introduction

This eBook provides PacifiCorp employees with an overview of the training new managers receive regarding safety, including various responsibilities, policies, forms and processes.

Chapter 1 looks at training objectives related to this session.

**Manager Safety Training**



# Training Objectives

**This eBook provides an overview of the following subjects and skills:**

- Knowledge on safety training for new managers
- Comparisons of various safety policies, forms and processes
- Details of OSHA regulations at PacifiCorp

**This eBook aligns with industry standards, codes and best practices through use of the following reference material:**

- Pacific Power New Managers Managing Safety PowerPoint Series
- PacifiCorp Manager Safety Guide Document
- Pacific Power Guidelines for an OSHA Inspection Document
- PacifiCorp Safety Compliance Reporting Document

# Our Core Principles



### CUSTOMER SERVICE

We are focused on delivering reliability, dependability, low prices and exceptional service to our customers. We are committed to providing innovative solutions that our customers want and need.



### EMPLOYEE COMMITMENT

We equip employees with the resources and support they need to be successful. We encourage teamwork and provide a safe, rewarding, equitable and inclusive work environment. We make no compromise when it comes to safety and security.



### ENVIRONMENTAL RESPECT

We are committed to using natural resources wisely and protecting our environment for the benefit of future generations. Our Environmental RESPECT Policy details this commitment.



### REGULATORY INTEGRITY

We adhere to a policy of strict regulatory compliance and pursue frequent, open communication with regulators regarding our business performance.



### OPERATIONAL EXCELLENCE

Together with our employees, we pride ourselves on excellence in every aspect of our work. Our high standards for operations and system maintenance enable us to meet and exceed our customers' expectations, perform our work safely and preserve our assets.



### FINANCIAL STRENGTH

We are excellent stewards of our substantial financial resources. Backed by Berkshire Hathaway, we invest in hard assets and focus on long-term opportunities that will contribute to the future strength of the company.

## Section 3

# Human Performance Improvement

Human Performance Improvement (HPI) is applied to all aspects of work at PacifiCorp. HPI tools apply habits of thought and action to guide critical moments and reduce error. The following are PacifiCorp's seven HPI tools:

- [Peer Checking](#)
- [Self Check \(STAR\)](#)
- [Two Minute Rule](#)
- [Stop \(Questioning Attitude\)](#)
- [Three-Way Communication](#)
- [Circle-Slash \(Place Keeping\)](#)
- [Phonetic Alphabet](#)

These **HPI tools**, referred to as PiTSTOP, are explained in depth in PacifiCorp's "HPI: PiTSTOP" eBook.

Apply the **HPI TOOL** appropriate for the job.



*Wherever this image appears, select it to display the HPI tool that relates to the content on the page.*



**P**eer Checking  
**i** Self Check (STAR)  
**T**wo Minute Rule  
**S**top (Questioning Attitude)  
**T**hree-way Communication  
**Ø** Circle-Slash (Place Keeping)  
**P**honetic Alphabet

## Chapter 2

---

# Overview

---

Chapter 2 provides an overview of training objectives for managers regarding safety, as well as the responsibilities of different management positions.

---

**Manager Safety Training**



# Training Objectives

PACIFIC  
POWER



### Video 2.1 Manager Safety Training Overview

Play this video to learn more about the safety training required for new managers.

Training is required for all PacifiCorp employees to prepare them for duties associated with their assigned positions. As employees are promoted, their title changes, as do their responsibilities.

Employees who become managers must be trained in a variety of subjects to adequately prepare them for leadership roles.

Safety is a major concern at PacifiCorp, and it is important that new managers are trained to be able to comprehend practices and procedures in the following safety-related concepts:

- Responsibilities of various employees
- Website usage
- Policies regarding safety
- **Accident** and **incident** processes
- Crew visits
- Safety compliance
- **Occupational Safety and Health Administration (OSHA)**

## Safety Goal

A major goal of PacifiCorp is to have zero workplace incidents. This goal is commonly referred to as Target Zero, which aims to create a safer work environment. By training managers in safety, they can better ensure proper and safe performance of job duties. Understanding the expectations of health and safety in the workplace will help managers maintain a safe work environment where incidents are less likely to occur.

## Safety Plan

At PacifiCorp, there is an annual safety plan. Managers must be aware of their responsibilities in that plan, whether the responsibilities include crew visits, working with at-risk employees, completing audits, etc. These responsibilities vary each year, so be sure to check the safety improvement plan and understand assigned responsibilities. Berkshire Hathaway requires improvement year over year as part of this plan to get to Target Zero.

## Safety Responsibility

PacifiCorp employs several methods to ensure it fulfills responsibilities associated with the safety of its employees.

For example, developing and updating safety policies provides a written form of the rules and processes of different procedures performed by employees. Also, monthly safety meetings allow a space for employees to discuss safety topics and how to better improve work processes.

The remainder of this eBook discusses the importance of safety in the workplace and the areas in which managers need to be trained to help maintain safety.



### Video 2.2 Safety Roles for Management

Play this video to learn more about the responsibilities of managers.

Some of the managers' responsibilities include:

- Safety Improvement Plan (SIP)
- Conducting coaching meetings
- Overseeing crew visits

- Picking and assigning mentors
- Preparing probationary documents
- Participating in other SIP items for injury reduction
- Safety Committees
  - Ensuring chairpersons and secretaries attend training
  - Ensuring meetings are held
  - Preparing for meetings
  - Attending meetings
  - Completing training
  - Ensuring action items are assigned and completed
  - Performing quarterly inspections

- Ensuring safety file cabinet and bulletin board are updated
- Accident notification to the Safety Department
  - Notifying Safety Administrator and Director
  - Completing **Automated Worker's Accident/Incident Reports (AWAIR)**
  - Assisting with investigations and **root cause analyses (RCAs)**
  - **Nurse-first**
  - Sending employees for drug screening, if appropriate
  - Assisting employees with completing state paperwork, such as workers' compensation and DMV documents
- Employee training
- Working with chemicals
- OSHA documents

## Apply the **HPI TOOL** **PEER CHECKING**



*Managers are responsible for ensuring employees receive proper training to safely perform their work duties.*



Attending safety meetings is important for managers.



### Video 2.3 Safety Team Duties

Play this video to learn more about the duties of the different roles in the Health and Safety Department.

The Health and Safety Department can assist with some safety duties for managers and are a great resource for all managers.

The following positions are Safety Department roles for the Health and Safety Department:

- Safety and Health Managing Director
- Safety, Health and Training Director
- Safety Manager
- Safety and Health Compliance Specialists
- Safety Administrators
- Safety Analysts
- Nurses

## Safety and Health Managing Director

The Safety and Health Managing Director has the following duties:

- Responsible for all the PacifiCorp safety teams
- Make decisions on recordability for all accidents and incidents
- Govern all aspects of the health and safety team
- Act as a liaison with Berkshire Hathaway
- Responsible for the development and implementation of the safety improvement plan

## Safety, Health and Training Director

The Safety, Health and Training Director has the following duties:

- Handle day-to-day operations with the safety team
- Sign-off on all:
  - Training material the Safety Department is delivering
  - Tools the Safety Department sanctions
- Review all accidents and incidents to assist in determining corrective actions
  - This helps to prevent the accidents from happening again in the future.

**Note:** All field personnel for the Safety Department report to this person.

# Safety Manager

Safety Managers have the following duties:

- Oversee policy and procedure development for the safety team
  - All documents start with this role and are developed with company policy, labor agreement and OSHA regulations considered.
- Oversee the health and wellness programs, such as the company nurses, ergonomics and industrial hygiene
- Oversee reporting for the Safety Department, including public safety training events, company reporting, Edison Electric Institute (EEI) activities and OSHA logs



Managers serve as advocates of safety in the workplace.

# Safety and Health Compliance Specialists

Safety and Health Compliance Specialists have the following duties:

- Assist with policy inquiries
- Assist with chemical management for [MSDSonline](#)
- Assist with account setup for fire-resistant (FR) clothing
- Assist with OSHA inspections
- Assist with issues or concerns of safety administrators
- Assist with reporting questions or concerns
- Assist with accident investigation notifications, questions or corrective actions
- Assist with injury reduction programs and policy changes
- Training development



Use available resources for any safety concerns.

**Note:** The Safety and Health Compliance Specialist title is used in several roles for the Safety Department. Some employees with this title are technically nurses, whose responsibilities are later listed. These employees also complete all safety administrator functions.

## Safety Administrators

Safety administrators should be utilized first for most questions and inquiries. Safety administrators have the following duties:

- Assist with monthly safety meetings
  - Training monthly compliance
  - Providing rosters for safety topics
  - Helping guide chairperson and secretary
- Assist with facility audits
- Assist with OSHA inspections
- Assist with additional regulations, training and safety inquiries
- Assist with incident investigations, due process and AWAIR coordination
- Crew visits
- Storm duty
- Training (specialized)
- Deliver annual safety training

## Safety Analysts

Safety Analysts have the following duties:

Responsible for:

- The business operations of the Safety Department
  - The Health and Safety webpage
  - All regulation reporting
  - All company reporting:
    - ✦ Daily, weekly, monthly and annual reports are required throughout many different organizations.
- Assist with company documents
- Complete all purchases and inquiries for the items from the safety team

## Nurses

Nurses have the following duties:

- Engage with employees, managers and workers' compensation on all employee injuries
- Act as first line of defense for any employee that:
  - Has an injury
  - Is concerned about an injury developing
  - Has disease-related inquiries
- Communicate with the medical field on any injury
  - This ensures that the injured employee has all the tools and information necessary for a speedy recovery.
  - **Note:** The company may also have additional contract staff to handle fit-for-duty exams, hearing tests and return-to-work exams.



Reach out to a PacifiCorp nurse for medical concerns.

- Responsible for case management on all injuries, which includes interactions with the employee, manager, Safety Department (where appropriate) and workers' compensation
- Assist with health-related training for some work groups
- Verify any health-related material to be delivered by another safety team member is accurate

Question 1 of 4

**Which of the following safety-related concepts must new managers be trained in? Select all that apply.**

- A.** Crew visits.
- B.** Fit test employees.
- C.** OSHA.
- D.** Accident and incident process.

Check Answer

Question 2 of 4

**What is Target Zero?**

- A.** The PacifiCorp goal of having zero tool replacements.
- B.** The PacifiCorp goal of having zero workplace incidents.
- C.** The PacifiCorp goal of having zero employee absences.
- D.** The PacifiCorp goal of having zero equipment failures.

Check Answer

Question 3 of 4

Which of the following is not a manager's responsibility?

- A.** Training employees.
- B.** Attending Safety Committee meetings.
- C.** Overseeing crew visits.
- D.** Leading Safety Committee meetings.

Check Answer

Question 4 of 4

**Which of the following are the management job titles for the Health and Safety Department? Select all that apply.**

- A.** Safety Compliance Specialists.
- B.** Safety Administrators.
- C.** Safety Analysts.
- D.** Nurses.

Check Answer

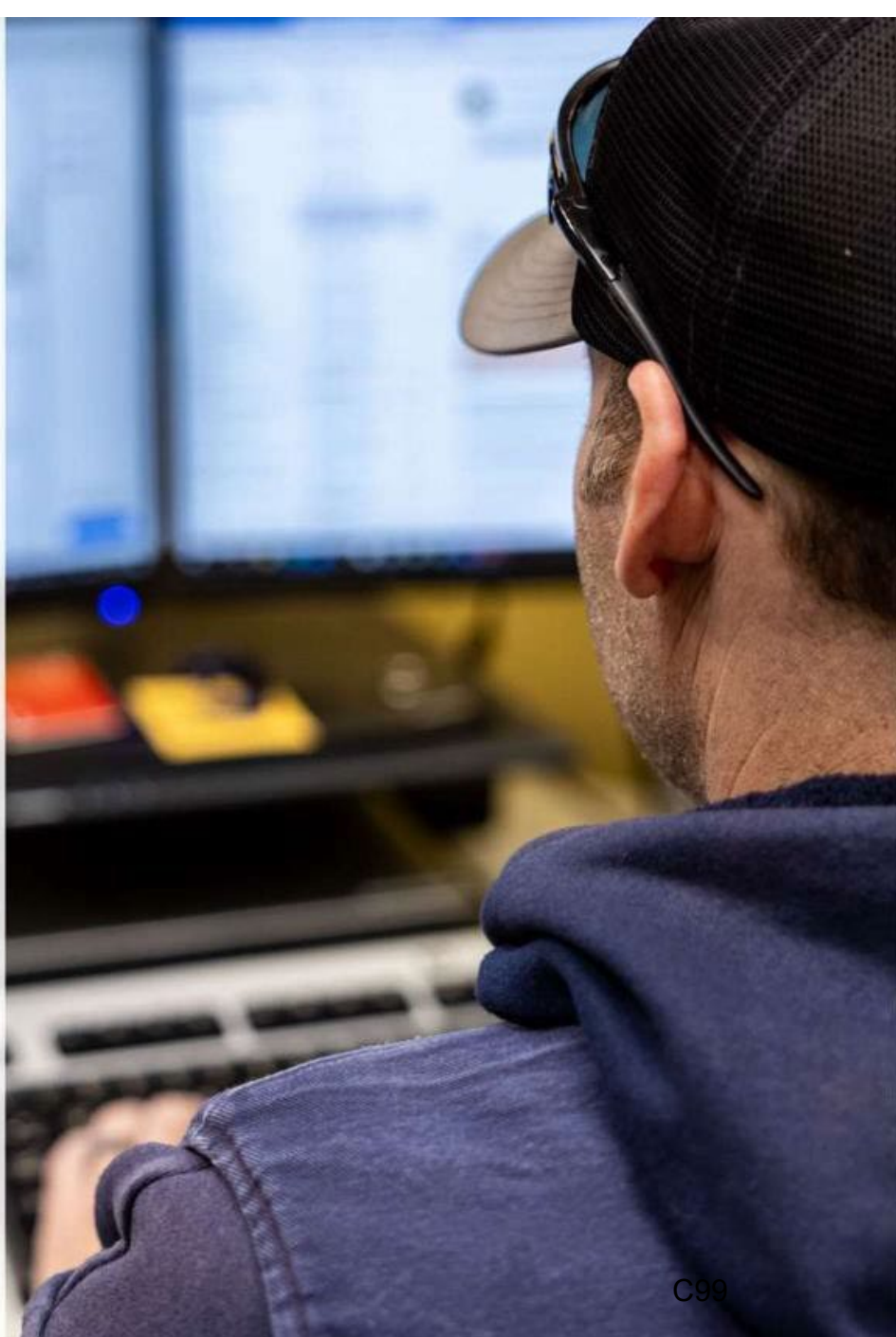
## Chapter 3

---

# Website

---

Chapter 3 provides a brief overview of the Health and Safety page on the PacifiCorp website.



## Section 1

# Intranet Use for Health and Safety

PacifiCorp uses an [intranet](#) for its website so that employees can access company-specific policies, resources, documents and more.

Under the **Health & Safety** tab, there are options to choose from for more information, including the following:

- Safety and Occupational Health
- Public Safety
- Safety Reporting and Compliance

The following image shows how the **Health & Safety** tab appears on the PacifiCorp website.



## Policies and Forms

Most of the policies and forms associated with safety can be found on the PacifiCorp website. Be sure to click on the appropriate page to find the policy or form needed. Employees on the Pacific Power side should look under the Pacific Power tab for territory-specific information, while employees on the Rocky Mountain Power side should look under the Rocky Mountain Power tab. The slight differences between the information are mostly state-driven.



### Video 3.1 Website Overview

Play this video to learn about the company website.



### Video 3.2 Policies Overview

Play this video to learn more about safety policies.





Safety data sheet.

PacifiCorp uses MSDSonline to manage the **safety data sheets (SDS)** of all chemical inventories. An SDS provides the safety information of a chemical. The manufacturer of the chemical product creates this document to list the health, safety and environmental information for the user.

To access SDSs, employees can go to the Health and Safety page on either the Pacific Power or Rocky Mountain Power intranet sites. Once there, they can set up the site to provide information based on their location or look up information by manufacturer or item.

Employees need to know the hazards of the chemicals they are working with before using the chemical. All chemicals must be approved before they are brought on site. The manager must ensure the **“Request for Chemical Purchase”** document is completed, signed by the manager and submitted to the Safety Department. Only approved chemicals should be allowed.

Managers are responsible for ensuring that employees are trained to use chemicals, have the correct personal protective equipment (PPE) for the chemicals they use and know what to do in the event of an emergency.

It is also part of the manager's responsibility to ensure the employees label all secondary chemical containers and cover all new chemicals that are brought into the facility. This can occur at a stand up or safety meeting.

Managers and all other employees working with chemicals are encouraged to download the SDS/ Chemical Management mobile application onto their mobile devices for quick access to SDSs, where employees can easily search and view chemical products. In case an employee needs to review this information later, it can be saved to their mobile devices for offline use.

To access PacifiCorp's SDSs via the company website, employees should follow the [Company Link](#)<sup>27</sup>. The QR code below can also be scanned to access the SDSs.



Scan to access an **MSDS**

The mobile application can be downloaded or installed for the company mobile application portal. No username or password is needed for this site. The following is the icon for the MSDSonline mobile application. Select this icon on a mobile device to access MSDSonline.



## Safety Compliance Policies

Managers must be aware there are health and safety policies that are OSHA-driven. There are stand-alone policies outside of the Accident Prevention Manual (APM) and Safety Resource Manual, including the following:

- Bloodborne Pathogens (BBP)
- Hazard communication (HAZCOM)
- Hearing
- Respirator
- PPE
  - Steel-toe boots, safety eyewear, etc.
- Fire-resistant (FR) clothing
- Transport policies
- Safety resource manual
- Voltage verification process



Always wear appropriate PPE for the task at hand.

These policies are located on the Health and Safety page on the PacifiCorp website. Managers should familiarize themselves with these policies to ensure compliance by the employees and company.

Question 1 of 3

**Which of the following options are under the Health & Safety tab on the PacifiCorp website?**

- A.** Public Safety.
- B.** Safety and Occupational Health.
- C.** Employee Safety.
- D.** Safety Reporting and Compliance.

Check Answer

Question 2 of 3

**Managers should download the mobile application onto their devices for quick access to SDSs.**

- A.** True.
- B.** False.

Check Answer

Question 3 of 3

Which of the following is not a stand-alone policy outside of the Accident Prevention Manual?

- A. Hazard communication.
- B. Respirator.
- C. Bucket operation.
- D. Transport policies.

Check Answer

## Chapter 4

---

# Accidents and Incidents

---

Chapter 4 provides a brief overview of the manager's role in accident and incident processes.

---

**Manager Safety Training**





### Video 4.1 Accidents and Incidents Overview

Play this video to learn more about the manager's role in accident and incident processes.

PacifiCorp strives to prevent every incident no matter how small. In the unfortunate case where an incident has occurred, managers must understand how to handle these situations.

The two main types of incidents are personal injury and vehicle. The severity of these incidents ranges depending on the circumstances surrounding the event.

Regardless of the severity, a manager must always be informed of the situation. For minor incidents, a manager is notified sooner in the process. For major incidents, a manager may not be notified until after the injured persons have been transported to the hospital for emergency medical service.

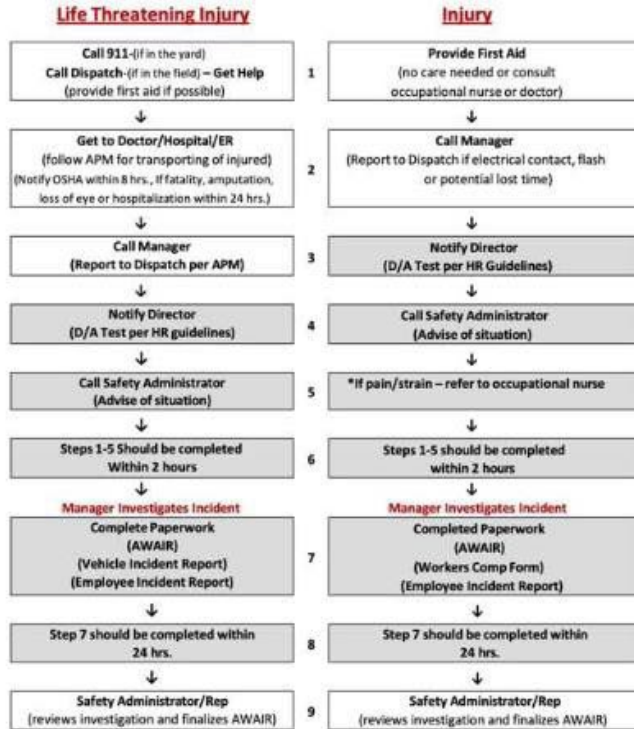
Once notified, managers could be responsible for reporting to dispatch, if necessary, as well as the safety director and administrator. From there, the manager must travel to the scene of the incident to perform the investigation and complete associated paperwork.



The following flowchart shows the steps to follow for personal injuries:



**Personal Injury Flow Chart**



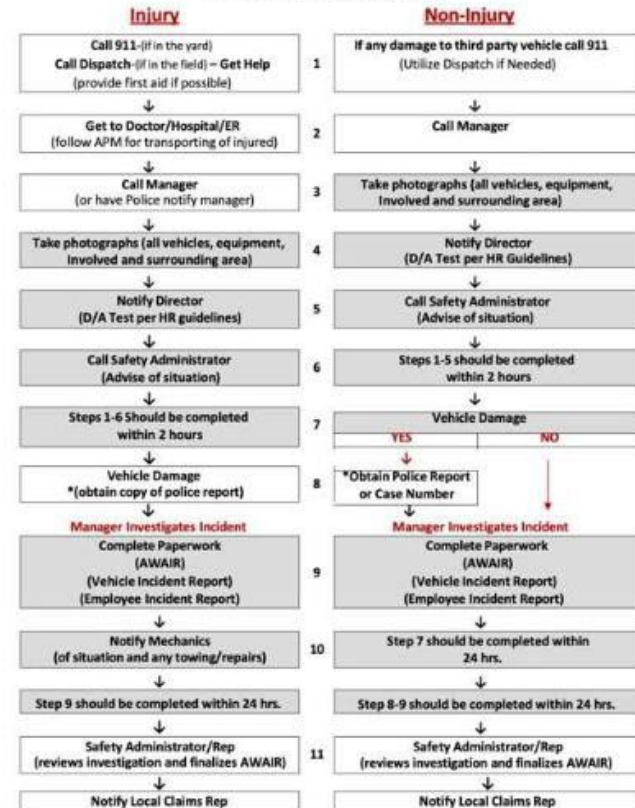
*Note: all serious injury incidents will have a full investigation as directed by the unit Vice President and/or the Director of Safety and Training.*

COMPANY CONFIDENTIAL – FOR INTERNAL USE ONLY		
Safety and Training Dept. Doc:5.06.17.004.v2	Personal Injury Flow Chart Originally Issued: 04/12/2013	Last Revised: 05/09/2017

The following flowchart show the steps to follow for vehicle incidents:



**Vehicle Incident Flow Chart**



COMPANY CONFIDENTIAL – FOR INTERNAL USE ONLY		
Safety and Training Dept. Doc:5.06.17.004.v2	Vehicle Injury Flow Chart Originally Issued: 04/12/2013	Last Revised: 05/09/2017

## Injured Employee

Take the following steps when an employee has been injured in an accident:

- Employee care
  - Checking injury
  - First aid and CPR, if necessary
- Nurse-first
  - Early intervention
- Local clinic/occupational health
- Drug screen
- Manager packets
  - **Note:** Manager packets are available through the nurses. These can include items such as a paper copy of the AWAIR, drug screen policy, medical update/return to work form, etc.



First aid kits can be used for minor injuries.

- **Note:** Ask a nurse for these packets.
- Workers' compensation
- Accident investigation
  - Picture taking, employee statements, etc.
- Fit for duty

**Verify Employee Information:**

Incident Date Submitted (mm/dd/yyyy)	01/01/2017
Employee Number Submitted:	P 00029355
Corresponding Employee Name:	Patricia S Muffley
Injured Employees Position:	Business Spclst
Organization:	00001487 PP Field Safety
Location:	00482033 LLOYD CTR TOWER-RM 1700 625 NE MULTNOMAH
City:	PORTLAND
State:	OR
Postal Code and Country:	97232 US

Complete AWAIRs for all incidents.

Automated Worker's Accident/Incident Report (AWAIR) supports safety as PacifiCorp's top priority by creating a centralized, automated, online system for the collection and supervisory reporting of incidents. AWAIR decreases the incident reporting process lifecycle from an average of four weeks to just a few days.

AWAIR streamlines incident reporting at PacifiCorp, which has the benefits of:

- Eliminating unnecessary duplication in reporting and sharing information
- Facilitating better management response to injuries
- Providing more accurate and more timely reporting of safety incidents
- Enabling more immediate access by safety staff and workers' compensation staff/carriers
- Supplying more timely information for Key Performance Indicators (KPI) reports
- Documenting historical incident data

Typically, managers are responsible for filling out and submitting AWAIRs to track accidents and incidents. AWAIRs must be completed for *all* incidents, and they must be completed to start workers' compensation.

To fill out AWAIRs, the following information is required:

- Brief description of the incident
- Employee(s) statement
- Additional information, such as:
  - Impacts to employee/public
  - First aid/medical attention
  - Investigation analysis
  - Findings/actions
  - Workers' compensation
  - Reporting times from employee
- Related pictures

AWAIR software.

FOLLOW UP Item Description / Work Order	Target Date	Person Responsible	Completed Date

After AWAIRs are completed, a safety administrator is responsible for finalizing the report.

To access the form for AWAIR, follow this [link](#).

To access the handwritten form for AWAIR, follow this [link](#).

For help filling out AWAIR forms, the AWAIR user guide is a great tool. To access the user guide, follow this [link](#).

For more information on the accident/incident investigation process, refer to the “Safety Committee” eBook or the AWAIR user guide linked above.

The following images show examples of how AWAIRs appear online:

Fill out all required information for AWAIRs.

Submit AWAIRs for approval after completion.

The following are the associated forms for accidents/incidents:

- Employee Statement/Incident Form
- Vehicle Accident Report Form
- Root Cause Analysis (RCA)
- Due Process (Scored Document)
- Significant Event
- Police Reports (Risk Management)
- Safety Communications
- State-issued forms from the Department of Transportation

Apply the **HPI TOOL**  
**SELF CHECK**



*Always use the appropriate forms for accidents and incidents.*



Take time to fill out all necessary forms.

## Employee Statement/Incident Form

An employee statement/incident form allows the employee(s) involved in the incident to give a statement on what happened, including details of the event, lessons learned and prevention [methods](#). If this form is not readily available, the employee statement can be typed or written on a notepad.

## Preventable Vehicle Accident (PVA)

A PVA is an accident that occurs because the driver failed to use every precaution to prevent the [incident](#). The vehicle accident report is used for all vehicle accidents. All information must be complete and submitted with the employee incident report. Make sure the diagram is also complete. This information helps give the investigators an understanding of what occurred.

## Root Cause Analysis (RCA)

RCA is a systematic technique in which the real cause of a problem is discovered and addressed so that similar incidents are prevented in the future. Personal and environmental factors can be root causes, as well as company policies and [decisions](#).

## Due Process (Scored Document)

A PVA score card is used for due process interviews with the union. This form shows the employee's training history, information about the accident, damage amounts, etc. Filling out this form allows a company to decide the driver's punishment and is used in calibration of the event.

The chart on the following pages is the PVA score card.

Feature	Accident Factor	Answer
Vehicle	What is the estimated cost of the vehicles damaged?	
	Was a trailer being towed? What type and length? What is the unit number?	
	Was the airbag(s) deployed?	
	Was the company vehicle driven away; driven away with some modification; or towed? <i>(Choose one)</i>	
	What is the type of company vehicle the driver was operating?	
	What did the company vehicle collide with?	
	Were other vehicles involved? How many?	
	What other property was damaged?	



Feature	Accident Factor	Answer
Driver	How many preventable accidents has the driver had in the past 36 months? 24 months? 12 months?	
	Has the employee had a defensive driving course? Has the employee had the Smith System driving course? ( <i>When?</i> )	
	What is the extent of the driver's injury?	
	What is the extent of injury to any other party?	
	Safe Start state ( <i>Rushing, Frustration, Fatigue, or Complacency</i> ) of driver? ( <i>Choose one</i> ). Why?	
	How many people are involved ( <i>other than driver</i> )?	
	How many people were in the company-operated vehicle(s) ( <i>other than driver</i> )?	
	Was pull-through possible? Was it used?	
	Was a spotter available? Were they used?	
	Was the driver's assigned duty regularly scheduled work; call out from home; personal break/lunch; or dispatched to a new assignment? ( <i>Choose one</i> )	
	Driver's job title?	
	What validated distractions did the driver have ( <i>i.e., cell phone, food, paperwork, etc.</i> )?	

Feature	Accident Factor	Answer
Journey	What was the company vehicle's speed ( <i>prior to braking</i> )?	
	Was a traffic law violated? What was the infraction? Was a citation issued? ( <i>It is a violation to damage property with a vehicle.</i> )	
	How far had the driver traveled since their last stop?	
	Where did the collision occur? ( <i>i.e., highway, parking lot, service center, driveway, construction zone, school zone, etc.</i> )?	
	Did the collision occur within a fenced area like a power plant or substation?	
	What time of day did the collision occur?	
	What were the weather conditions ( <i>list all—wind, fog, rain, snow, sleet, sunny, clear, etc.</i> )? Were there any visibility limitations? What?	
	What was the direction of travel ( <i>forward, reverse, or stopped</i> ) and, if applicable, had the vehicle been parked just prior to the collision?	
	What is the type and condition of the road surface ( <i>i.e., paved and dry</i> )?	
	How many separate trip starts had the driver made during the day or shift? ( <i>List the number up to six or write "greater than six"</i> )	

## Significant Event

A significant event is any adverse circumstance which could have resulted in serious injury or death. Some examples include a falling object, loss of load, gas ignition, etc.

**Note:** An employee *does not* have to sustain an injury for the event to be considered **significant**.

## Police Reports (Risk Management)

To notify risk management of an incident, a risk-save document must be completed. The risk-save document is issued by a dispatch employee. All lost time, electrical contacts, potential flashes and potential lost time incidents must be reported to dispatch per the APM. All car verse pole and fires are also reported on this system.

Police may respond to events, so a police report may be issued by a responding police report if there was a citation given during the accident. Please note all citations on AWAIR for proper follow-up in determining the cause of an accident.



Always use the appropriate forms.

## Safety Communications

Safety communications resources can include:

- Incident briefs
  - Safety incident briefs are issued by the Safety Department after an incident has occurred in the field. This document shows lessons learned and recommendations to reduce future incidents of that type.

- Safety alerts
  - Safety alerts are issued when there is a recognized concern from an employee, state or local official and another utility.
- Safety information bulletins (SIBs)
  - SIBs are issued by the Safety Department when a process or procedure changes. These can also be issued after a serious event has occurred.
- Safety in 60 Seconds videos
  - Safety in 60 seconds videos are issued by the Safety Department when a concept or issue is explained more effectively by a video.
- Manufacturer recalls
  - Manufacturer recalls occur for tools and equipment. When they occur for safety reasons, this may result in managers assisting in gathering the items to be replaced.
- Media boards
  - Media boards are in every service center. They have a rotating message displayed to inform employees of current important topics, whether it is related to safety or operations of the company.
- Safety boards
  - Safety boards are required in all locations. The safety board communicates the safety messages to all employees. This board needs to be maintained with current information and required documentation when needed.
- Standards changed
  - Standards changes are submitted by the engineering team. These are usually communicated by engineers at a safety meeting and then posted. These changes can have a safety impact as well as reliability impact and should not be ignored.

## Section 4

# OSHA Recordables

OSHA **recordables** are workplace incidents that require medical treatment. Because some injuries only require first aid, not all incidents are considered OSHA recordables. All final calls on recordability are made by the Managing Director of Safety and Health for PacifiCorp with consideration of all the information gathered in an accident investigation.

Refer to the chart on the following pages to determine whether an injury is considered a recordable.



Injuries that only require first aid are not considered recordables.

ISSUE	RECORDABLE (needing medical treatment)	NON-RECORDABLE (First Aid)
Visits to Health Care Professionals	ANY CONDITION that is treated, or that should have been treated, with a treatment not on the first aid list	* Visits solely for observation, testing, or to evaluate diagnostic decisions
Cuts, Lacerations, Punctures and Abrasions	<ul style="list-style-type: none"> <li>• Sutures (stitches)</li> <li>• Staples</li> <li>• Surgical glue</li> <li>• Treatment of infection with prescription meds on any visit</li> <li>• Application of prescription antiseptic or a non-prescription antiseptic at prescription strength</li> <li>• Surgical debridement (cutting away dead skin)</li> </ul>	<ul style="list-style-type: none"> <li>• Any wound coverings or bandaging by any medical personnel</li> <li>• Liquid bandage</li> <li>• Cleaning, flushing or soaking wounds on the surface of the skin</li> <li>• Using wound coverings such as bandages, Band-Aids, gauze pads, etc. or using butterfly bandages or steri-strips</li> </ul>
Inoculations	<ul style="list-style-type: none"> <li>• Hepatitis B vaccine or rabies vaccine</li> <li>• Vaccinations necessary to enable the employee to perform work duties</li> </ul>	<ul style="list-style-type: none"> <li>• * Tetanus immunizations</li> <li>• Pre-exposure Hepatitis B vaccine</li> </ul>

ISSUE	RECORDABLE (needing medical treatment)	NON-RECORDABLE (First Aid)
Strains, Sprains and Dislocations	<ul style="list-style-type: none"> <li>• Casts or immobilization with rigid stays</li> <li>• Chiropractic manipulation</li> <li>• Exercises recommended by a health care professional who trains the worker in the proper frequency, duration and intensity of the exercise</li> <li>• Physical therapy</li> </ul>	<ul style="list-style-type: none"> <li>• Hot or cold therapy</li> <li>• Any non-rigid means of support, such as elastic bandages, wraps, non-rigid back belts, etc.</li> <li>• Finger guards</li> <li>• Temporary immobilization devices while transporting an accident victim (i.e., splints, slings, neck collars, back boards, etc.)</li> </ul>
Burns, Skin Rashes and Blisters	<ul style="list-style-type: none"> <li>• * Any condition that results in days away from work, restricted work, transfer to another job, or medical treatment beyond first aid</li> </ul>	<ul style="list-style-type: none"> <li>• * Draining fluid from a blister</li> </ul>
Bruises	<ul style="list-style-type: none"> <li>• * Draining of bruises by a needle</li> </ul>	<ul style="list-style-type: none"> <li>• Soaking therapy</li> <li>• Hot or cold therapy</li> </ul>
Medications	<ul style="list-style-type: none"> <li>• Prescription medication, whether given once or over a longer period of time</li> <li>• Prescription medication, whether that prescription is filled and taken or not</li> <li>• Non-prescription medication administered or prescribed at prescription strength</li> </ul>	<ul style="list-style-type: none"> <li>• Non-prescription medicines at non-prescription strength, whether in an ointment, cream, pill, liquid, spray or any other form</li> </ul>

ISSUE	RECORDABLE (needing medical treatment)	NON-RECORDABLE (First Aid)
Splinters	<ul style="list-style-type: none"> <li>* Foreign bodies which require more than simple means to remove because of their location, depth of penetration, size or shape</li> </ul>	<ul style="list-style-type: none"> <li>Removing foreign bodies from the eye using only irrigation or a cotton swab</li> <li>Removing splinters or foreign material from areas other than the eye by irrigation, tweezers, cotton swabs, or other simple</li> </ul>
Physical Therapy	<ul style="list-style-type: none"> <li>Exercises recommended by a health care professional who trains the worker in the proper frequency, duration and intensity of the exercise</li> <li>Any prescribed physical therapy</li> </ul>	
Loss of Consciousness	<ul style="list-style-type: none"> <li>Loss of consciousness which results from a workplace event or exposure (e.g., chemicals, heat, an oxygen deficient environment, a blow to the head)</li> </ul>	<ul style="list-style-type: none"> <li>Loss of consciousness due solely to epilepsy, diabetes, narcolepsy, or other personal health conditions</li> <li>Due to voluntary participation in a wellness or similar program (e.g., company sponsored blood donation)</li> </ul>
Oxygen	<ul style="list-style-type: none"> <li>* Oxygen administered to an employee exposed to a substance who exhibits symptoms of an injury or illness</li> </ul>	<ul style="list-style-type: none"> <li>* Oxygen administered purely as a precautionary measure to an employee who does not exhibit any symptoms of an injury or illness</li> </ul>

Question 1 of 5

**Which of the following are the main types of incidents? Select all that apply.**

- A.** Intentional.
- B.** Personal.
- C.** Vehicle.
- D.** Unintentional.

Check Answer

Question 2 of 5

**What is the first step to take when an employee has been injured in an accident?**

- A.** Drug screen.
- B.** Accident investigation.
- C.** Workers' compensation.
- D.** Employee care.

Check Answer

Question 3 of 5

**Managers are not responsible for filling out AWAIRs.**

- A.** True.
- B.** False.

Check Answer

Question 4 of 5

**Which of the following information is required for AWAIRs? Select all that apply.**

- A.** Employee statement.
- B.** Related pictures.
- C.** Brief description of the incident.
- D.** Manager title of employee involved.

Check Answer

Question 5 of 5

**An employee does not have to sustain an injury for the event to be considered significant.**

- A.** True.
- B.** False.

Check Answer

## Chapter 5

---

# Crew Visits

---

Chapter 5 provides a brief overview of crew visits for managers, including purpose and documentation.

---

**Manager Safety Training**





### Video 5.1 Crew Visits Overview

Play this video to learn more about crew visits.

When a manager goes out to a job site to observe the crew, it is called a crew visit. The goal of a crew visit is to ensure employees are following proper work procedures, such as testing, grounding and using appropriate minimum approach distances, to actively maintain safety on the job site.

The following are purposes of crew visits:

- Per safety plan
  - Requires managers to complete a certain number of visits with a certain number of employees in a set timeframe
- High-risk
  - Employees involved in two or more accidents in a certain period of time or employees who have a certain number of AWAIRs in a certain period of time
  - Focus audits for any employees involved in an accident within the calendar year are also required.

- New hire
  - Employees that are new to the company (been employed less than a year)
- With safety administrator
  - Work with the safety administrator to visit a crew to help identify hazards
- Build relationships
  - Checking compliance
  - Getting better understanding of what employees do
  - Building trust with employees

To locate crews, managers can use an automatic vehicle location app such as the GPS Insight. The following icon is for the GPS Insight mobile application. Select this icon to access GPS Insight from a mobile device.



### Video 5.2 Manager Safety Training

Play this video to learn about manager safety training.



Crew visits ensure employees are working safely.

## Tailboards

During a crew visit, when possible, the manager should attend the **tailboard** to make sure it is being held and that all the required elements are being discussed. Requesting to see a tailboard when arriving onsite for a crew visit also informs the manager of the hazards on the job. Re-tailboarding should also occur if the original was missed. All completed tailboards should be turned in to the manager at the close of the job by the employee. A complete tailboard ensures, at a minimum, there is understanding by all crew members of the following elements:

- Scope of work to be performed and work procedures involved
- Sequence of work (to include main steps and safety critical points if they exist)
- Special tools or equipment, as applicable
- Hazards associated with this work activity and the surroundings



Tailboard document.

- Work procedures
- Special precautions
- Energy source controls
- PPE requirements for the job
- Emergency response actions/ emergency egress routes

For more information on tailboards, refer to the “Tailboards” eBook.

Managers should use the Crew Visit Do Form, which is found on a mobile application, to document information gathered during a crew visit. To properly document a crew visit, follow these steps:

- Download the doForms app
- Log in
- Select the Crew Visits or SAPHO icon
- Add relevant information
  - Such as location, employee names, HPI tools, PPE, driver safety, housekeeping, tools and equipment, etc.
- Send copies
  - The app automatically sends one copy to the Health and Safety Department.

The following icon is for the doForms mobile application. Select this icon to access doForms from a mobile device.



Question 1 of 3

**Crew visits do not help build relationships.**

- A.** True.
- B.** False.

Check Answer

Question 2 of 3

**Which app is used to document a crew visit?**

- A.** MSDSonline.
- B.** GPS Insight.
- C.** Microsoft Teams.
- D.** doForm.

Check Answer

Question 3 of 3

**Completed crew visit forms are saved in the doForm system and can be viewed later.**

- A.** True.
- B.** False.

Check Answer

## Chapter 6

# Safety Training

Chapter 6 provides a brief overview of the various types of safety training for employees at PacifiCorp.

**Manager Safety Training**



Managers are responsible for ensuring that employees receive all required training. The following are types of training that employees may need:

- New Hire
  - Required for all new field employees, usually within the first 30 days
  - This covers topics such as OSHA safety compliance and basic information on Smith's driving.
  - Emergency procedures for the specific location the employee will reside in must be completed by the local manager.



**Video 6.1** Safety Training Overview

Play video to learn about required safety training.

- Human Resources New Hire Training
  - This would include all the information new hires need to understand the company and the policies and procedures for their employment.

- Human resources may require other training, such as three-way communication and PacifiCorp accountability, to be completed for new hire employees.
- Safety Compliance
  - Required for all employees to complete per OSHA regulations
    - ✦ This is reoccurring usually on an annual basis.
- Smith System Driving Training
  - Required for all new employees if they will be driving a company vehicle, usually within the first 60 days
  - Refresher classes occur occasionally, and all employees involved with a PVA must complete Smith's training again.
- Safety Stand-Down Day (SSD)
  - SSD1
    - ✦ Required for all field employees, usually completed in the first half of the year
  - SSD2
    - ✦ Required for specific employees in certain crafts, like underground crews and Distribution Equipment Maintenance Center (DEMC), usually completed in the latter half of the year
- Technical
  - This training comes from the technical department and can include grounding, transformer training and other appropriate craft-specific training.
- Refreshers, Exceptions or Make-Up
  - Refreshers occur on certain topics as needed, usually based on events that happen or employees involved in accidents.

- Any employee who has *not* completed required training would appear on the exceptions list and would have to complete make-up training. Since most safety training is required by law, 100% compliance is desired.

♦ **Note:** This may require them to travel to another location for training.

- From Events

- This happens when a significant event occurs, such as serious accidents, fatalities and inspections.

- Forklift

- Required for any employee who is going to operate a forklift, no matter their job title, task or frequency of use.

- Other – Flagger

- Required every three years for any lineman positions and any employee wishing to flag for overtime.



Certain equipment may require additional training.

- Field Rescue

- This would include items such as bucket rescue, pole-top rescue, tower rescue, etc.

- Craft-Specific

- This would include individual training for all crafts based on company needs and job requirements.

## New Hire

A mentoring program will be established for each new employee to kickstart the learning of the PacifiCorp safety culture, and these mentors are assigned by managers. A progress report is used to show the safety training for new employees. This [form](#) is available on the doForms system.

New hires must be properly trained before beginning their work duties, especially on required PPE and any specialized equipment necessary to perform work.

The following are items that new hires must be trained in regarding PPE and specialized equipment:

- PPE
  - PPE must be issued for the hazards the employee will encounter. This equipment is purchased by the company and should be kept in safe order. New hires are required to be issued this equipment before being exposed to a hazard.
- Tools
  - Craft-specific tools are provided by the local manager or location.
- FR
  - All new hire employees are signed up with a Tyndale account for FR clothing.
- Matrix
  - The [matrix](#) provides information on the required PPE for different job tasks.
- Technical Training
  - Some specific crafts do require specialized equipment and will be issued to employees that have completed the training/certification.
- Additional Training (flagger, forklift, etc.)
  - Certain jobs require specific PPE that can be issued as employees complete training and certifications.



Always equip the appropriate PPE for a job.

## PPE

PPE is required for all employees in certain areas and for certain tasks no matter what their job entails. It is the company's responsibility to issue this equipment to protect the employee.

There are different union agreements for PPE, including FR gear. The employee must be set up with an account. It is their responsibility to use and care for their equipment, and managers are responsible for ensuring use and helping to replace damaged equipment.

## Matrix

The matrix is provided to educate employees and managers on PPE for each craft. The matrix, which is in the form of a table, includes the work type, voltage and required PPE. Some of the notes in the matrix would include:

- Workers shall use the greater of this table or the Accident Prevention Manual (APM), minimum approach distance for the system worked.
- The table is based on arc flash protection and calculation substation engineering policy.
- Reference arc flash clothing policy and Safety Department's requirements on PPE policy.
- Transmission energized work shall coordinate with arc flash analysis.
- Meter pullers are required to be used to remove energized meters unless the design of the meter base does not allow the puller to be used.

- Mandatory per PPE and FR policies in the APM.
- There are some exceptions for hot stick work and risk assessment.

## Records and Rosters

All employee training is currently being tracked in the learning management system called Success Factors. Safety training and other compliance training is assigned to an employee in the system.

To get credit for training, an employee must send in a roster to document the training, the date of the training and who was trained.

This form needs to be completed correctly and submitted to the appropriate email dependent on where the employee is located (Pacific Power or Rocky Mountain Power). Learning management numbers and clearly written employee numbers must be included.



PPE.

The following email should be used for employees on the Pacific Power side:

- [trainroster@PacifiCorp.com](mailto:trainroster@PacifiCorp.com)

The following email should be used for employees on the Rocky Mountain Power side:

- [rmptrn@PacifiCorp.com](mailto:rmptrn@PacifiCorp.com)

Question 1 of 3

**When should new hire training be completed?**

- A.** Within the first 30 days.
- B.** Within the first six months.
- C.** Within the first year.
- D.** At any time during employment.

Check Answer

Question 2 of 3

**It is the company's responsibility to issue PPE to protect employees.**

- A.** True.
- B.** False.

Check Answer

Question 3 of 3

**What is the name of the learning management system used to track employee training?**

- A.** Successful Employees.
- B.** Employee Training.
- C.** Success Factors.
- D.** Employee Factors.

Check Answer

# Chapter 7

# OSHA

Chapter 7 provides a brief overview of OSHA regulations at PacifiCorp, including posting, training, policies and visits.

Manager Safety Training





Refer to the Safety Department for more information on OSHA posting.

For more information on OSHA reporting criteria, visit this [link](#).

## Training

OSHA holds employers responsible for providing a safe workplace. The mission of OSHA is to ensure workers' protection and prevent work-related injuries and fatalities by setting and enforcing standards, and by providing proper and appropriate training. The training required by OSHA standards ensure that workers have the required skills and knowledge to safely perform work.

At PacifiCorp, OSHA requires training on different intervals for different topics. All this training is from OSHA regulations [1910 and 1926](#). Employers are required to follow those OSHA policies and complete training with a competent person.



Safety bulletin board.

Most of this training occurs during the Safety Stand-Down Day, but other trainings will be required throughout the year. Also, these trainings can vary based on location, job description and required tasks. The APM also identifies some additional training that may be OSHA-specific.

**Note:** The OSHA Training Requirements book has the specifics for all training topics. This book can be found [here](#).

## Section 2

# Policies

PACIFIC  
POWER



PacifiCorp regulates chemicals in the workplace.

PacifiCorp has established policies for all OSHA-regulated topics. The federal OSHA topics are the baseline of all regulations.

The company must follow OSHA regulations first, then the state/local requirements and can either meet or exceed federal requirements. The PacifiCorp Health and Safety page features individual policies and references, which include:

- Chemical hazard management
- Asbestos
- Bloodborne pathogens (BBP)
- Hearing loss prevention
- Respiratory protection programs
- PPE
- FR clothing
- Respirable Crystalline Silica program
- Confined spaces
- Hazard identification and inspection

**Note:** State and local regulations may also require specific training, policies or practices.

To refer to these policies on the PacifiCorp website, visit this [link](#).

**Note:** As OSHA regulations change, company policies will also be updated. Be sure to check the website for the most up-to-date policies. Other topics can also have standards created which will result in a new policy, and management will be notified when that occurs.



Confined space.





When OSHA inspections occur, the employer is required to cooperate. The following are the purposes of OSHA visits:

- Complaints
  - Come from the public or employees based on an implied violation
  - These could also happen if an employee feels like their concern is not being taken seriously.
- Post-Accident
  - All employers are required to notify OSHA when an employee is killed on the job or suffers a work-related hospitalization, amputation, or loss of an eye.

- This inspection usually happens after a serious incident or fatality has occurred at a work location.
  - ✦ All work-related fatalities must be reported within eight hours.
  - ✦ Only fatalities occurring within 30 days of the work-related incident need to be reported.
  - ✦ An in-patient hospitalization, amputation or eye loss must be reported within 24 hours.
    - **Note:** These notifications or reports will be made by the Safety Department.



Always comply with OSHA visits.

- Consultant
  - Free of charge and can provide insight on any concern or topic for employee safety
  - This also can be used to obtain Voluntary Protection Programs (VPP) status.

- Scheduled Health and Safety
  - OSHA inspectors are given a list of inspections that need to occur at random. Those inspections are necessary to adhere to standards for compliance and safety and health.

## What to Do During a Visit

When an OSHA inspection is anticipated, it is important that managers prepare. Proper preparation can result in a much more professional response and demonstrate a commitment to safety.

To prepare for an OSHA inspection:

1. Identify who at the facility will act as the lead representative. In most cases, the lead manager should serve in this capacity.
  - a. A trained alternate should be designated in case the lead manager is not available.
2. Know the location of safety files and ensure they are both orderly and complete.

Upon arrival of the inspector, be sure to politely invite them in and ask to see their credentials or authorization papers. Once their identification is confirmed, follow these steps:

1. Have the inspector sign-in to the company entry log, including their name, title, date, and time.
2. Have the inspector take a seat in a waiting area while the lead manager is located.
3. Call the facility's Safety Field Administrator and ask if they are available to participate in the inspection.
  - a. If they are, determine how long it will take them to arrive. The inspector may be willing to wait a reasonable amount of time for them to arrive.
4. Contact the Safety team and inform them of the inspection.
  - a. This ensures that someone is available by phone for any necessary assistance during the inspection.



Always identify the inspection type before beginning.

An opening conference is conducted to identify the type of inspection and which area of the facility is to be inspected. During this conference, the lead representative should:

- Explain company safety rules (provide any specific local guidance for visitors).
- Ensure that the inspector has any required PPE.
- Establish a schedule for the inspection and ample time allocated.

The inspector may request an employee representative to participate in the inspection, and they may ask to interview employees privately during the inspection.

The lead representative must accompany the inspector for the entire inspection. The lead representative also has the following responsibilities:

- Answer the inspector's questions.
  - If the lead representative cannot answer a question, they should tell the inspector they will get the information and provide it later.
  - Never lie to the inspector or guess the answer.
- Take pictures where and from the same angle the inspector takes pictures.
- Ask the inspector to split any samples they may take.
- Ask the inspector to explain any notes they may take and write down the same thing.



A closing conference is conducted at the end of an OSHA visit. During this conference, the lead representative should request a copy of the inspector's notes, as well as their list of findings and an explanation of the findings. This information must be carefully recorded to help address the findings.

**Note:** Ensure the inspector signs out before leaving the facility.

After the inspection is complete, the lead representative has the following responsibilities:

- Create a file of:
  - The notes, assumptions and opinions, including all information received from the inspector
  - A copy of all data requested by and/or given to the inspector, including test results, SDSs, organization charts, etc.
  - Photographs, maps, plot plans, etc.
  - Split sample identification number(s) and sampled material(s), test results, etc.

- All other inspection-relation information
- Send a copy of the file to the Health and Safety Department as soon as possible.
- Contact the Health and Safety team and advise them of any communication received from the agency regarding the visit.
  - **Note:** It may take some time for the agency to report back with an official finding of any citations and proposed penalties.
  - The staff will work with the lead representative and the location to complete the inspection process and any reporting of corrective actions and penalties.
  - If any citations occur from an inspection, those notifications must be sent to the Safety Department and filed in the local safety file cabinet.

Question 1 of 4

**OSHA holds employers responsible for providing a safe workplace.**

- A.** True.
- B.** False.

Check Answer

Question 2 of 4

**Which of the following are purposes of OSHA visits? Select all that apply.**

- A.** Complaints.
- B.** Post-Accident.
- C.** Consultant.
- D.** Scheduled Health and Safety.

Check Answer

Question 3 of 4

**What is the first thing an inspector should do when arriving to a facility?**

- A.** Take a seat in the waiting area.
- B.** Conduct the inspection.
- C.** Take notes and samples.
- D.** Sign-in to the company entry log.

Check Answer

Question 4 of 4

Which of the following is not a responsibility of the lead representative?

- A. Answer the inspector's questions.
- B. Leave the inspector alone for the inspection.
- C. Take pictures where and from the same angle the inspector takes pictures.
- D. Ask the inspector to split any samples they may take.

Check Answer

## Chapter 8

# Final Review

This Final Review gives individuals a chance to test knowledge of the most important takeaways from this session.

Manager Safety Training



Take this final review quiz to assess your knowledge.

Question 1 of 22

**Which of the following safety-related concepts must new managers be trained in? Select all that apply.**

- A.** Crew visits.
- B.** Fit test employees.
- C.** OSHA.
- D.** Accident and incident process.

Check Answer

Take this final review quiz to assess your knowledge.

Question 2 of 22

**What is Target Zero?**

- A.** The PacifiCorp goal of having zero tool replacements.
- B.** The PacifiCorp goal of having zero workplace incidents.
- C.** The PacifiCorp goal of having zero employee absences.
- D.** The PacifiCorp goal of having zero equipment failures.

Check Answer

Take this final review quiz to assess your knowledge.

Question 3 of 22

Which of the following is ***not*** a manager's responsibility?

- A. Training employees.
- B. Attending Safety Committee meetings.
- C. Overseeing crew visits.
- D. Leading Safety Committee meetings.

Check Answer

Take this final review quiz to assess your knowledge.

Question 4 of 22

**Which of the following are the management job titles for the Health and Safety Department? Select all that apply.**

- A.** Safety Compliance Specialists.
- B.** Safety Administrators.
- C.** Safety Analysts.
- D.** Nurses.

Check Answer

Take this final review quiz to assess your knowledge.

Question 5 of 22

**Which of the following options are under the Health & Safety tab on the PacifiCorp website?**

- A.** Public Safety.
- B.** Safety and Occupational Health.
- C.** Employee Safety.
- D.** Safety Reporting and Compliance.

Check Answer

Take this final review quiz to assess your knowledge.

Question 6 of 22

**Managers should download the mobile application onto their devices for quick access to SDSs.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 7 of 22

**Which of the following is not a stand-alone policy outside of the Accident Prevention Manual?**

- A.** Hazard communication.
- B.** Respirator.
- C.** Bucket operation.
- D.** Transport policies.

Check Answer

Take this final review quiz to assess your knowledge.

Question 8 of 22

**Which of the following are the main types of incidents? Select all that apply.**

- A.** Intentional.
- B.** Personal.
- C.** Vehicle.
- D.** Unintentional.

Check Answer

Take this final review quiz to assess your knowledge.

Question 9 of 22

**What is the first step to take when an employee has been injured in an accident?**

- A.** Drug screen.
- B.** Accident investigation.
- C.** Workers' compensation.
- D.** Employee care.

Check Answer

Take this final review quiz to assess your knowledge.

Question 10 of 22

**Managers are not responsible for filling out AWAIRs.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 11 of 22

**Which of the following information is required for AWAIRs? Select all that apply.**

- A.** Employee statement.
- B.** Related pictures.
- C.** Brief description of the incident.
- D.** Manager title of employee involved.

Check Answer

Take this final review quiz to assess your knowledge.

Question 12 of 22

**An employee does not have to sustain an injury for the event to be considered significant.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 13 of 22

**Crew visits do not help build relationships.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 14 of 22

**Which app is used to document a crew visit?**

- A.** MSDSonline.
- B.** GPS Insight.
- C.** Microsoft Teams.
- D.** doForm.

Check Answer

Take this final review quiz to assess your knowledge.

Question 15 of 22

**Completed crew visit forms are saved in the doForm system and can be viewed later.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 16 of 22

**When should new hire training be completed?**

- A.** Within the first 30 days.
- B.** Within the first six months.
- C.** Within the first year.
- D.** At any time during employment.

Check Answer

Take this final review quiz to assess your knowledge.

Question 17 of 22

**It is the company's responsibility to issue PPE to protect employees.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 18 of 22

**What is the name of the learning management system used to track employee training?**

- A.** Successful Employees.
- B.** Employee Training.
- C.** Success Factors.
- D.** Employee Factors.

Check Answer

Take this final review quiz to assess your knowledge.

Question 19 of 22

**OSHA holds employers responsible for providing a safe workplace.**

- A.** True.
- B.** False.

Check Answer

Take this final review quiz to assess your knowledge.

Question 20 of 22

**Which of the following are purposes of OSHA visits? Select all that apply.**

- A.** Complaints.
- B.** Post-Accident.
- C.** Consultant.
- D.** Scheduled Health and Safety.

Check Answer

Take this final review quiz to assess your knowledge.

Question 21 of 22

**What is the first thing an inspector should do when arriving to a facility?**

- A.** Take a seat in the waiting area.
- B.** Conduct the inspection.
- C.** Take notes and samples.
- D.** Sign-in to the company entry log.

Check Answer

Take this final review quiz to assess your knowledge.

Question 22 of 22

**Which of the following is not a responsibility of the lead representative?**

- A.** Answer the inspector's questions.
- B.** Leave the inspector alone for the inspection.
- C.** Take pictures where and from the same angle the inspector takes pictures.
- D.** Ask the inspector to split any samples they may take.

Check Answer

Click the blue text below each term to view the term in context.

## A

### **Accident**

An unplanned, unwanted, but controllable event which disrupts the work process and causes injury to people or property.

[Chapter 2, Training Objectives](#)

### **Automated Worker's Accident/Incident Report (AWAIR)**

A centralized, automated, online system for the collection and supervisory reporting of incidents.

[Chapter 2, Responsibilities of Managers](#)

## C

### **Circle-Slash (Place Keeping)**

A human performance tool in which a worker uses a place keeping technique to check off steps in a process. In this technique, circle the step to be completed and read aloud. Perform the step. Draw a slash through the circle of the step once it has been completed. Move on and circle the next step, repeating this method again until all steps have been completed.

[Chapter 1, Human Performance Improvement](#)

Click the blue text below each term to view the term in context.

## H

### **Human Performance Improvement (HPI) Tools**

A collection of concepts and techniques meant to reduce the chance of error in work, and to detect and improve upon organizational weaknesses that increase the chance of error.

[Chapter 1, Human Performance Improvement](#)

## I

### **Incident**

An unplanned and unwanted event which disrupts the work process and has the potential of resulting in injury, harm or damage to people or property.

[Chapter 2, Training Objectives](#)

## **Intranet**

A private network used by an organization to help employees communicate and share information.

[Chapter 3, Intranet Use for Health and Safety](#)

## M

### **MSDSonline**

A program PacifiCorp uses to manage the SDSs of all chemical inventories.

[Chapter 2, Management Roles](#)

Click the blue text below each term to view the term in context.

## N

### **Nurse-First**

The term used for contacting a PacifiCorp occupational health nurse before going to the doctor for injuries when appropriate (aches, pains, etc.).

[Chapter 2, Responsibilities of Managers](#)

## O

### **Occupational Safety and Health Administration (OSHA)**

A federal agency of the United States government that regulates workplace safety and health.

[Chapter 2, Training Objectives](#)

## P

### **Peer Checking**

A human performance tool in which a knowledgeable peer observes or checks the behavior of the performer prior to the action being taken to prevent errors.

[Chapter 1, Human Performance Improvement](#)

### **Phonetic Alphabet**

A human performance tool in which workers engage in a communication technique to ensure letters are understood by using corresponding words for the letters in question (Alpha for A, Bravo for B, etc.).

[Chapter 1, Human Performance Improvement](#)

Click the blue text below each term to view the term in context.

## R

### **Recordable**

A workplace incident that requires medical treatment.

[Chapter 4, OSHA Recordables](#)

### **Root Cause Analysis (RCA)**

A process of figuring how and why errors occurred.

[Chapter 2, Responsibilities of Managers](#)

## S

### **Safety Data Sheet (SDS)**

A document provided by the manufacturer or producer of a chemical that provides its safety information.

[Chapter 3, MSDSonline](#)

### **Self Check (STAR)**

A human performance tool in which a worker reflects on the acronym STAR to help focus their attention on the task at hand. STAR stands for Stop, Think, Act and Review. Stop and pause prior to performing critical steps. Think and focus attention on the step to be performed. Act and perform the intended step. Review and verify that the anticipated outcome of the step completed is as expected.

[Chapter 1, Human Performance Improvement](#)

Click the blue text below each term to view the term in context.

## T

### **Tailboard**

A pre-job safety meeting.

[Chapter 5, Purpose](#)

### **Three-Way Communication**

A human performance tool in which workers engage in a technique to ensure communications are understood correctly prior to an action being taken. In this communication technique, a sender establishes initial contact with a receiver, and the sender clearly states the message. The receiver repeats the message in their own words, repeating critical details (equipment name, number, position, etc.) verbatim— word for word. If the message is correct, the sender acknowledges that the receiver's response is correct. If any uncertainty or confusion develops, stop and start over.

[Chapter 1, Human Performance Improvement](#)

Click the blue text below each term to view the term in context.

## **Two Minute Rule**

A human performance tool in which a worker takes time to observe a job site upon arrival to identify and resolve any abnormal conditions or safety hazards.

[Chapter 1, Human Performance Improvement](#)