

Self-Assessment: Compare the Plan with Real Work

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Why this matters

A process can look complete in the plan while people experience gaps in work. Assess how it operates. Compare its intended result with records, worker accounts and safe observations. Keep differences visible so the assessment can improve the system that supports the task.

Objective: Compare one work process with its intended result using more than one evidence source, then define a verified improvement.

Key hazards or failure points

Scoring from memory; choosing only easy areas; staged demonstrations; treating one observation as universal; dismissing conflicting accounts; findings reported without correction or later review.

Practical controls

- Choose a bounded process, such as obtaining current instructions or arranging required support. Identify its intended result and governing requirements. State which tasks, shifts and conditions the assessment will cover.
- Include people who use and support the process. Review relevant records and observe ordinary work from authorized safe positions. Keep unobserved conditions and contrary evidence visible rather than forcing a favorable rating.
- Record what works and what needs improvement. Assign findings to responsible owners, arrange necessary protection and review proposed changes through the approved process. Define how their effect will be checked after implementation.

Verify It in the Field

Select one process claim and locate its current requirement or stated objective. Ask a worker to describe how it works on their shift, then compare a relevant record. Record the scope, evidence sources and any disagreement needing follow-up.

Observe the relevant handoff or resource arrangement safely during normal work, without staging exposure or disrupting a critical step. Compare the result with the claim. Record the actual condition, observer and time; do not extend that finding to unexamined shifts.

After an approved improvement, repeat the agreed check and ask affected workers about usability. Record the source criterion, actual result and remaining limitations. Check for new problems and give the group feedback before treating the finding as resolved.

Stop and reassess

Pause the assessment if it interferes with safe work or asks someone to defeat a safeguard. Act on a serious unresolved hazard immediately. Keep conclusions limited when evidence conflicts or the selected sample does not cover the conditions being claimed.

Ask the crew

1. What result is this process supposed to provide?
2. Which evidence could show that our picture is incomplete?
3. How will we check whether the improvement works on another shift?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009 Vol. 2, pp. 75–76; OSHA Program Evaluation and Hazard Prevention.

Free next step: [JHA/JSA planning & field-verification worksheet](#)

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/safety-self-assessment-real-work

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