

## The Briefing Manual

A 'Participants Briefing Manual' should be provided to every EWP participant during the initial project briefing. This Briefing Manual then serve as a tool to provide the participants with an understanding of the project's Goals and Objectives. In addition, this document serves as a primary reference source for project information.

The manual should be provided in a lose leaf binder with several Tab sections. The binder format allows participants to add appropriate information to the document as it becomes available.

The manual should contain the following information:

Tab Section 1	<b>Participant Briefing</b> This is a copy of the briefing presented to all participants at the start of the project.
Tab Section 2	<b>Presentation Overheads (paper copy)</b> assistance, onsite facilitators, etc. By providing copies of all overheads during the various presentations, the participants have some place to take notes and to save them in an appropriate location for future reference.
Tab Section 3	<b>EWP Implementation Plan</b> A copy of the signed EWP Implementation Plan for the project should be included to allow everyone to see the agreed upon activities.
Tab Section 4	<b>Time Line</b> A copy of the proposed time line for the project
Tab Section 5	<b>Contacts List</b> This section contains a list of all of the participants along with their telephone and FAX numbers. In addition it lists support personnel such as HQ technical
Tab Section 6	<b>Miscellaneous</b> A section for maintaining general notes and handouts such as Exposure Assessment Guides, etc.

The remainder of this section contains a sample briefing manual. While not all sections have actual contents these materials should be included with site specific information.

# **Sample Briefing Manual**



# Enhanced Work Planning Demonstration Project

## **Participant Briefing**

**[SITE]**  
**[DATE]**

Department of Energy  
Office of Environment, Safety and Health

### **About this Manual**

The function of this manual is to provide the participants of the Enhanced Work Planning Demonstration Project with a document which can be used as a reference tool through out the demonstration project. As a reference tool the materials contained in this manual may provide more detail than actually needed to do your part as a 'team member'.

The manual is being provided as a loose-leaf binder with several 'tab' sections. This format will allow the addition of new materials, as well as useful references' that apply to the sites specific demonstration project.

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# **Participants Briefing**

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<p style="text-align: center;"><b>ENHANCED WORK PLANNING DEMONSTRATION PROJECT</b></p> <p style="text-align: center;"><b>PARTICIPANT BRIEFING</b></p>
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**I. INTRODUCTION AND OVERVIEW**

**A. Introduction**

Three vital elements of the Department of Energy's environment, safety, and health goals are:

- Work planning, hazard analysis and hazard control are essential for effective management of environment, safety, and health
- Line management is fundamentally responsible of environment, safety, and health; and
- Worker participation greatly enhances environment, safety, and health effectiveness.

Enhanced Work Planning (EWP) addresses these three elements through the use of multidisciplinary teams (composed of, in part, line management, workers, and health and safety professionals) to document and build upon the site's existing work planning process.

[**Site Name**] is undertaking an Enhanced Work Planning demonstration project in order to evaluate and enhance the work planning process. This demonstration project was designed to be small in scale, so that the enhanced work planning process can be tested with minimal impact to the site.

Since this is a 'small' project, be sure to become acquainted with all of the participants and their roles in the enhanced work planning process. [NOTE: A list of individuals involved in the Enhanced Work Planning demonstrations (support, site representatives, and site participants) has been included in this manual use this form to record the name and telephone number of the team members.]

**B. Purpose of the Demonstration Project and Briefing**

The purpose of this briefing is to ensure that all of the participants in the Enhanced Work Planning (EWP) demonstration project have a common

understanding of the project. With this core of knowledge everyone involved can work as an effective 'team member' toward achieving the goals and objectives of this project.

As a participant you will assist in documenting current work planning procedures and identifying potential enhancements. You will then apply these enhancements using the principles of the Enhanced Work Planning to a limited number of jobs. Upon completion of the demonstration you will report the successes and lessons learned from carrying out this project

Utilization of the Enhanced Work Planning process should result in better communication between all groups involved not only in work planning but also those involved in carrying out the work as well as everyone responsible for health and safety.

Again, this demonstration projects is designed to be small in scale, with minimal impact to the site. The desired outcomes are improved communications, reports documenting practices before and after the demonstration, the lessons learned from the demonstration, and recommendations for using part or all of this process at other locations throughout the sites.

### **C. Project Goals and Objectives**

The participants in this EWP demonstration project should effectively work toward achieving the following project goals and objectives:

- Positively impact the work planning process, enhance efficiencies, and reduce risk and vulnerability by improving work planning from both an operational and worker protection standpoint;
- Work cooperatively with management, labor, and health and safety professionals through the formation of multi disciplinary teams;
- Demonstrate that the Enhanced Work Planning model works;
- Facilitate the integration of reliable and effective hazard based analysis techniques into the work planning process;
- Determine the most appropriate means for conducting hazard characterization to aid line management, employees, and

occupational health and safety personnel in reducing risks and vulnerabilities; and

- identify and evaluate successful work planning strategies and techniques (from both existing as well as “enhanced” processes) for possible export to facilities on this sites.

The participants of this demonstration project will be able to:

- Identify all of the elements of the enhanced work planning process along with the participants and their roles.
- Actively participate in the work planning process.
- Identify and apply hazard analysis techniques in the work planning process.
- Describe the elements of an effective exposure assessment program.

## **II. Enhanced Work Planning**

Work Planning is a process which determines the requirements, means, and design to accomplish intended work. Factors considered during work planning include: operations and maintenance; methods and procedures; materials and resources; priorities and schedules; hazards and controls; quality assurance; and costs. Work planning may initiated by line management, engineers, or planners.

The rigor of the planning process depends on factors such as risk, safety, complexity, routine versus non-routine. An appropriate degree of rigor in planning is important to the effective and efficient conduct of operations. Depending on the nature of the work, planning can involve multiple technical specialists, such as occupational health and safety (industrial hygiene, safety, health physics, and occupational medicine), waste management, and engineering with addition input from various levels of management and crafts.

The challenge of work planning is to conduct work in a timely, effective, and efficient manner, while ensuring the identification, evaluation, and control of workplace hazards. Enhanced Work Planning is designed to improve the standard work planning process by:

- Taking a cooperative team approach to planning. This is accomplished, in part, by fully integrating the input of occupational health and safety organizations,

worker (craft), and other professionals early in the process. This up-front, multi disciplinary planning approach lends itself to a reduction in the unnecessary rework of planning documents and work stoppages in the field due to factors such as safety or workability issues.

- Enhancing productivity through the reduction of unnecessary controls, monitoring, and medical surveillance; improving interaction and communication between craft and planning/design professionals; and reduction of work stoppages and document rework.
- Taking an approach that balances the rigor of planning with the risk and complexity of the job. This necessitates the use of an appropriate level of hazard analysis and control.
- Improving communication mechanisms between line management, workers, occupational health and safety, and all other groups which should be involved in the planning process.
- Identifying the appropriate customer and addressing his/her specific needs in a timely fashion.

## **A. Participants**

Generally two distinct teams are formed: 1) a multi disciplinary **Enhanced Work Planning Project Team (EWP Project Team)** consisting mostly of individuals involved in the day-to-day planning and conduct of work, and 2) an **Assistance Team**, made up of other interested stakeholders such as senior management, directors, and DOE officials. In addition to these two teams, facilitators from DOE headquarters may be involved in the conduct of the demonstration. More information on the roles and responsibilities of the EWP demonstration project participants may be found in the "Enhanced Work Planning Implementation Plan" Tab Section 5.

### **1. Enhanced Work Planning Project Team (EWP Project Team)**

Over the initial phase of the demonstration, a EWP Project Team (Figure 1.) will assembled with representatives from as many groups routinely involved in the planning and/or conduct of work as possible. This team may have different names at each site for example it may be called the "Core Team" or the "Work Control Team", however, its function will be the same as that outlined below.

The main function of the multi disciplinary EWP Project Team is to identify the key issues to be addressed by the demonstration project.

Through a systematic review of existing planning processes, the EWP Project Team will be responsible for jointly identifying where project emphasis should be placed (i.e., where enhancements to the existing planning process could be most beneficial), what the enhancements would be, and how these enhancements would be tested through incorporation into actual ("real life") projects. The EWP Project Team is also responsible for establishing performance indicators and judging the overall merit of adopted enhancements. By using this process the 'team' will explore how each 'group' contributes to the planning process, how planning ultimately affects and controls the conduct of work, and what each 'group' needs from the planning process to ensure safety and efficiency.

**Figure 1. Enhanced Work Planning Project Team (EWP Project Team) Participants**

<i>Potential EWP Project Team Participants</i>	
o craft supervision	o industrial hygiene
o safety engineering	o radiation protection
o medical	o planning/scheduling/coordination
o facility owners	o nuclear criticality
o waste management	o labor
o quality assurance	o training
o conduct of operations consultants	

Individuals on the EWP Project Team are generally selected based on the recommendation of their supervisors. Important considerations used for determining participant selection included:

- Willingness to constructively work with others to improve the status quo;
- Experience at the site within the respective technical discipline sought;
- Familiarity with existing planning practices (and/or their outcomes);
- Ability to devote four to six hours per week to the EWP demonstration over the duration of the project; and

- Existing job responsibilities and authority (i.e., participants should be able to help identify enhancements, test them, and have the credibility with their superiors to advocate the enhancement's adoption, as warranted).

The EWP Project Team usually meets once or twice weekly to discuss issues and jointly work through solutions to these issues. Meetings may last 1-2 hours during which time presentations may be made by one or more team members regarding a specifically identified issue or “straw man” enhancement to be critiqued by the group. Walk downs of selected jobs are conducted outside of the scheduled meeting times while the reviews and feed back from the walk downs are discussed during the meetings. Meeting minutes should be maintained as a record of the demonstration project. Further discussion of EWP Project Team activities is discussed below.

## **2. EWP Project Team Leader**

The duties of team leader include focusing the EWP Project Team on the key issues at hand, running meetings, issuing assignments, and ultimately deciding on how planning enhancements will be tested and incorporated into actual work activities. Over the course of the demonstration, the EWP Project Team Leader is also responsible for identifying and adding other participants to the effort, interfacing with site management and the Assistance Team members (see below), and, in general, providing checks and controls to ensure demonstration activities and work products were not fundamentally incompatible with existing site structures and overall policies.

## **3. Assistance Team**

The Assistance Team is assembled to help provide direction to the project, to facilitate the resolution of procedural matters, and provide senior management support when needed. The group is also responsible supporting the eventual “buy in” of the site to the various organizations at the site to the enhancements proven effective by the EWP Project Team. As identified in Figure 2., *Enhanced Work Planning Demonstration Project Assistance Team Participants* the Assistance Team is made up of site divisional and departmental directors, the EWP Project Team leader, DOE officials and other interested stake holders. Periodically over the course the demonstration, meetings are convened to inform the Assistance Team of EWP Project Team activities as well as to solicit concurrence with the scope and direction of the project.

#### 4. Site EWP Facilitators

DOE-HQ may provide support to the project through a site Facilitator, DOE technical expert, or other support contractor. Additional HQ support and coordination may be provided as the needs are identified.

**Figure 2. Enhanced Work Planning Demonstration Project Assistance Team Participants**

<i>Potential Assistance Team Participants</i>	
o Senior Contractor Management	o Operations Office Representative
o EWP Project Team Leader	o On site Project Facilitators
o Union Representative	o DOE HQ Technical Representative

The on site facilitator plays a key role in the success of the EWP demonstration project. The Facilitator will be stationed at the site throughout the duration of the EWP demonstration activities and work closely with the EWP Project Team Leader. The facilitator will assist the EWP Project Team leader in maintaining the focus of the project, helping organize and run meetings, maintaining communications with interested stakeholders at DOE and other contacts within the Complex, helping prepare "straw man" forms and procedures, and in general helping to insure the project proceeds without significant impediment. In addition the Facilitator will be responsible for maintaining project momentum. This momentum can be sustained through providing a full time presence, making frequent contact with all interested parties, working with the customer to identify specific needs, performing selected technical and management tasks, etc.

#### **B. Overview of the Enhanced Work Planning Demonstration Process**

The EWP demonstration project will be directed and carried out by the sites EWP Project Team with assistance from the on site facilitators. It is important to remember that the direction of the demonstration project is established by the site ( EWP Project Team and Assistance Team) and not by DOE HQ or the project facilitators.

There are five basic steps that will be carried out for all demonstration projects. These five steps are listed below:

**First**, performance criteria used to measure the progress toward achieving the goals of the demonstration project will be developed;

**Second**, the current practices of work planning and job and task hazard analysis will need to be identified and documented. During this time potential enhancements to the existing process will be identified;

**Third**, the EWP Project Team will select several activities that normally involve work planning and worker exposures;

**Fourth**, apply the elements of EWP (i.e., multi disciplinary team, employee involvement, job and task hazard analysis principles, etc.) and the enhancements identified to selected jobs over a six to eight week period; and

**Fifth**, document the improvements and value added from application of these principles, as well as any changes that are needed to improve the proposed work planning practices, draft exposure assessment guidance documents, employee involvement, and team work principles.

More information on how these steps are carried out can be found in the "Enhanced Work Planning Implementation Plan" behind Tab Section 5.

### **C. Elements of Enhanced Work Planning:**

#### **1. Hazard control through work planning**

Hazards can be more easily identified and controlled if they are considered during the work planning process. Foresight always reduces the risks and saves time and money. Keeping all of the core team informed and actively involved in the work planning process will result in a reduction of risks, and help avoid time-consuming duplication of effort.

#### **2. Employee involvement**

One of the project goals is to include direct employee participation in the work planning and exposure assessment process. This will help in the identification of the hazards.

#### **3. Coordination and communication**

It is important that each member of the core team knows their responsibilities, and the responsibilities of the other members. The following factors should also be considered about each core team member.

- Level of Involvement
- Frequency of Interaction
- Impact on the Process
- How to Close the Information Loop

#### **4. Hazard identification and assessment**

This simply means identifying the hazards associated with a job or task, and determining the potential exposures from each hazard. This will be described further in the Hazard/Exposure Assessment Section.

#### **5. Medical surveillance**

The occupational health personnel need to be involved in the work planning process from the beginning. This is because they need the hazard identification and assessment information to determine the relationships between hazard exposures and health effects. They must alert the core team to any illness trends that they may be observing which indicate a worker exposure that needs to be reduced. They are also the ones who determine employee medical fitness for a job or task.

#### **6. Lessons learned**

After the field demonstration is completed, the lessons learned should be documented. Any improvements, and their added value, should be noted and explained. As well as any changes needed to improve the enhanced work planning process or draft exposure assessment guidance documents.

#### **7. Performance Indicators**

Performance indicators are used to measure changes or trends in a process or program. They can be used to measure achievement toward reaching a goal.

The core team will select and measure the criteria to be used for performance indicators for this demonstration project as one of the first steps in this project. Performance indicators are needed to measure or describe the effectiveness of the enhanced work planning process. They are also needed to indicate the usefulness of draft guidance documents, or any changes that may be needed.

### **D. Path Forward**

As this project begins, and throughout its duration, you should ask:

- What Do I/You Do?
- Who Should be Involved?

- What Works?
- What Doesn't Work?
- How Can It be Improved?

Keeping these questions in mind will allow you to provide input into a process designed to examine and improve the way in which work is carried out, not only at your site but through out the DOE complex

At this point the **Enhanced Work Planning Demonstration Project** is **YOUR** project, and its success depends on your participation and input.

### **E. Schedule**

(See the **Schedule** / Time Line Tab Section)

# **Presentation Overheads**

Sample of Presentation Overheads may be found behind the 'Misc. Resource Information' Tab of this Program Development Kit.

# **Contacts List**



# **Sample EWP Implementation Plan**

Sample EWP Implementation Plan may be found behind the 'EWP Implementation Plan' Tab of this Program Development Kit.