



DAILY PRE-TASK PLANNING AND JOB HAZARD ANALYSES

Crew-Level Hazard Planning Before Work and When Conditions Change

POLICY STANDARD

Each active crew shall complete a documented pre-task plan with employee participation before beginning work and shall stop to update it whenever the task, people, equipment, environment or adjacent operations change. Paperwork never authorizes work when required controls are missing.

PHEIFER BROTHERS CONSTRUCTION CO., INC.

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USE OF THIS POLICY

This company planning process supports OSHA compliance but does not replace permits, engineered plans, competent-person inspections, operator qualifications, exposure-control programs or task-specific training.

Primary Regulatory References

- 29 CFR 1926.20 - Accident-prevention programs and competent-person inspections
- 29 CFR 1926.21 - Employee instruction in hazard recognition and avoidance
- 29 CFR 1926.32 - Competent-person and qualified-person definitions
- Applicable task-specific standards throughout 29 CFR 1926
- OSHA Publication 3071 - Job Hazard Analysis guidance

1. Purpose, Scope and Planning Requirements

Purpose and Scope

- Establish a consistent process for crews to understand the work, identify hazards before exposure, select effective controls, assign responsibility and plan emergency actions.
- Applies to every active Pheifer Brothers field crew and to covered shop, yard and support tasks. Subcontractors follow their employer's plan and coordinate with the controlling contractor/company.

When a Daily Plan Is Required

- Before each crew begins work each shift, even when the work appears routine or continues from the prior day.
- Before a new task, location, work phase or crew assignment and before an employee joins work that was already briefed.
- After a change, incident, near miss, stop-work event, control failure or other trigger in this policy.

Planning Standard

- Conduct the discussion at or near the work area when safe, using current conditions and the actual crew, tools, equipment, materials and sequence.
- Break the work into understandable steps; identify hazards for each step; select controls using the hierarchy of controls; assign responsible people; verify readiness before exposure.
- The form must reflect the work. Copying yesterday's plan, using generic phrases or collecting signatures without discussion is unacceptable.

Relationship to OSHA

- OSHA does not impose one universal form called a daily JHA for all construction tasks. This is a company requirement used to support the employer's accident-prevention and employee-instruction duties.
- Where a standard requires a written plan, permit, competent person, inspection, exposure assessment or engineering, that requirement remains fully applicable.

Stop-Work Authority

- Any employee may stop work when conditions differ from the plan, a control is missing/ineffective or the safe method is unclear. Good-faith stops are protected from retaliation.

2. Responsibilities and Crew Participation

Management / Project Management

- Provide adequate planning time, current plans/specifications, resources, competent/qualified persons, training and authority to correct hazards.
- Identify upcoming high-risk/nonroutine work early enough to prepare formal JHAs, engineered plans, permits and emergency/rescue arrangements.
- Review recurring deficiencies and ensure corrective actions are completed.

Foreman / Plan Leader

- Lead the plan with the crew before exposure; describe the day's work and ask employees to identify hazards and better controls.
- Verify conditions in the field, required competent/qualified persons, permits, inspections, PPE, equipment and emergency resources.
- Assign each control/action to a person and resolve it before affected work. Stop and replan when conditions change.
- Ensure late/relief employees receive the relevant briefing before joining the task.

Competent / Qualified Persons

- Complete required inspections/technical determinations and explain limits, warning signs and corrective actions within their designated scope.
- Do not allow the pre-task form to substitute for a required inspection, design or approval.

Employees

- Participate actively: describe how the work is actually performed, identify hazards, ask questions, propose controls and confirm assigned roles.
- Inspect assigned PPE/tools, follow the plan and report changes immediately. Do not sign a plan not understood or not discussed.
- A signature documents participation/receipt; it is not a waiver of rights, transfer of company responsibility or proof that every hazard was controlled.

Visitors / Deliveries

- Brief on access, PPE, traffic routes, restricted zones and emergency actions before exposure. Coordinate delivery/unloading hazards with the crew plan.

3. Daily Pre-Task Plan Versus Formal JHA

Daily Pre-Task Plan

- A shift- and location-specific discussion of today's work, current conditions, people, equipment, interfaces, controls and emergency actions.
- Prepared by the foreman with the crew before work and updated throughout the shift.
- May reference an approved formal JHA, but must translate it to actual field conditions.

Formal Job Hazard Analysis

- A more detailed analysis that breaks a job into steps, identifies hazards for each step and establishes a repeatable safe method/control set.
- Prepare before new, nonroutine, complex or high-risk work; work with severe potential consequences; work associated with incident/near miss; or when management/project requirements call for it.
- Develop with experienced employees and appropriate competent/qualified persons; obtain technical/design/industrial-hygiene input where needed.

Examples Requiring Enhanced/Formal Analysis

- Bridge demolition, girder erection, major crane/critical lifts, pile-driving setup, cofferdam/temporary-works phases and unusual falsework/formwork.
- Permit-required confined-space entry, hazardous-energy control, energized utility exposure, fall-rescue systems and work over/near water with complex rescue.
- Lead/coating disturbance, abrasive blasting, silica tasks outside established Table 1 controls, asbestos/unknown material and unusual chemicals.
- New equipment/method, first-time task, complex traffic staging/night work, railroad interfaces or multi-employer simultaneous operations.

Not a Substitute

- Neither document replaces a hot-work/entry/lift permit, traffic-control plan, fall-protection plan, silica plan, demolition engineering survey, excavation protective-system data, crane plan or other required program.
- Attach/reference those documents and carry their controls into the daily discussion.

Document Control

- Use the current approved JHA. Mark revisions and remove superseded copies. Field deviations require review, not handwritten design changes outside authority.

4. Preparing the Plan: Task Steps and Conditions

1. Define the Work

- State specific location, limits, outcome and sequence. Avoid vague entries such as 'bridge work,' 'concrete' or 'miscellaneous.'
- Identify what happens first, next and last, including setup, access, delivery, loading, cleanup, shutdown and handoff.

2. Identify People and Roles

- List crew and subcontractor interfaces; foreman, competent/qualified persons, operators, riggers/signal persons, spotters/flaggers, fire watch, attendants and first-aid responders as applicable.
- Confirm training/authorization and communication language/method. Account for new/temporary workers, fatigue and overlapping responsibilities.

3. Verify Current Conditions

- Walk the area: ground/edge stability, access/egress, traffic, utilities, water, elevation, structures, public exposure, weather, lighting and housekeeping.
- Review current drawings/specifications, permits, utility locates, SDSs, manufacturer instructions, inspection reports and prior shift handoff.
- Confirm emergency address/GPS/access, evacuation/muster, severe-weather shelter, 911 responsibilities and task-specific rescue.

4. Identify Equipment and Materials

- List cranes, aerial lifts, powered equipment, vehicles, hand/power tools, rigging, temporary power, pressure systems, chemicals and PPE.
- Complete required pre-use inspections and verify capacity, compatibility, guards, alarms and condition.

5. Make Steps Usable

- Use 5-10 meaningful steps for most tasks. Too broad hides hazards; excessive detail makes the plan unusable.
- Write actions in normal sequence and include transition points where energy, load, access or responsibility changes.

5. Hazard Identification

Ask for Each Step

- What can strike, crush, pinch, catch, pull in, fall, collapse, roll, swing, release, energize, burn, expose, drown or be entered by a person?
- What predictable change could make the step unsafe? What is the worst credible outcome and who else could be affected?

Highway / Bridge Hazard Categories

- Struck-by: live traffic, internal vehicles, backing, equipment swing, suspended loads, flying/falling material and pressurized hoses.
- Caught-between: excavations, moving equipment, articulation points, forms/falsework, steel members, rigging, conveyors and stored materials.
- Falls/drowning: deck/abutment edges, ladders, scaffolds, aerial lifts, temporary access, holes, steep slopes and work over water.
- Energy/electrical: overhead/underground utilities, temporary power, generators, hazardous energy, hydraulics, pneumatics, gravity, tension and rotation.
- Health: silica, lead, welding fumes, coatings/solvents, noise, vibration, heat/cold, ergonomic load and biological exposure.
- Structural/environmental: excavation cave-in, demolition instability, temporary works, concrete pressure, soil/water accumulation, wind/lightning/flooding.

Interfaces

- Public traffic/pedestrians, railroad or vessel movement, delivery drivers, subcontractors, cranes over work, work above/below, nearby hot work and shared utilities/access.
- Identify hazards the crew creates for others and hazards others create for the crew.

Sources of Information

- Crew experience and observations; prior plans/JHAS; incidents/near misses; competent-person inspections; SDSs; drawings/specifications; manufacturer manuals; exposure data; owner/WisDOT/project requirements.

Avoid Normalization

- A condition is not safe because it happened before without injury. Challenge shortcuts, changed conditions and workarounds.

6. Control Selection and Verification

Hierarchy of Controls

- Eliminate: change sequence/design/location so the hazard no longer exists - for example, assemble at ground level or eliminate backing.
- Substitute: use a less hazardous material, tool or method after evaluating new hazards.
- Engineering: barriers, guardrails, shoring, ventilation, machine guards, remote handling, water/dust controls, alarms and physical separation.
- Administrative/work-practice: plans, permits, trained roles, exclusion zones, spotters, traffic control, scheduling, communication and work/rest practices.
- PPE: properly fitting selected equipment as the last/combined layer; PPE does not replace feasible higher-level controls.

Control Quality

- Write specific controls: who, what, where, when and how verified. 'Be careful,' 'use PPE' and 'watch surroundings' are not sufficient.
- Use measurable limits where possible: fall distance/anchor, approach distance, capacity, slope/shoring, wind limit, water level, air-monitor threshold, lighting or exclusion boundary.
- Identify stop-work triggers and the person authorized to approve restart.

Verification Before Exposure

- Physically confirm guards/barriers, utility markings, protective systems, access, PPE, equipment inspections, permits, rescue gear, communications and emergency access.
- Confirm required competent/qualified person is available and required training/fit testing/operator qualification is current.
- Close or assign all actions. If a required control is not ready, mark the task on hold - do not sign around the problem.

Employee Understanding

- Ask open questions: 'Where is the greatest risk?' 'What changes would make us stop?' 'What do you do if contact is lost?'
- Have employees explain or demonstrate critical roles/signals. Correct misunderstandings before work.

Residual Risk

- If remaining risk is not acceptable or cannot be evaluated, stop and elevate to management/qualified resources.

7. High-Risk Work and Required Supporting Programs

Planning Integration

- List and verify the specific supporting plan/permit/inspection rather than rewriting it incompletely on the daily form.
- Carry critical field controls, limits, signals and emergency actions from each supporting program into the crew discussion.

Common Triggers

- Excavation/trenching: utility locate, soil/protective system, competent-person inspection, access, spoil/edge loads, water and atmosphere.
- Cranes/rigging: operator/inspection, setup/ground, power lines, lift path/exclusion, rigging/signal person, capacity and critical/personnel lift plan when applicable.
- Fall/elevated work: guardrails/PFAS, anchor/clearance, access, dropped objects, aerial/scaffold inspection and rescue.
- Traffic/night work: approved traffic-control plan, competent traffic-control setup, high visibility, lighting/glare, intrusion and internal traffic plan.
- Water/cofferdam: PFDs/rescue, skiff/ring buoys, rapid exits, pumping/water trigger, weather/flood and temporary-works design/inspection.
- Concrete/formwork/demolition/steel: engineered sequence, stability/bracing, exclusion, pressure/load limits and removal authorization.
- Health hazards: exposure-control plan, SDS, engineering controls, respiratory/hearing program, hygiene/decon and medical surveillance as required.

Permits and Hold Points

- Identify who issues/accepts/closes each permit and when work must pause for inspection, testing, engineer approval or strength result.
- Do not proceed past a hold point based on schedule or verbal assumption.

Emergency and Rescue

- The plan must identify credible severe events and immediate actions. Rescue procedures must be feasible for location/shift and coordinated with designated responders.
- Calling 911 alone may not satisfy prompt rescue needs for suspended falls, confined spaces or work over water.

Specialist Escalation

- Use RPE, industrial hygienist, environmental, utility owner, railroad, crane manufacturer or other specialist when the decision exceeds crew/competent-person authority.

8. Changes, Stop Work and Replanning

Replanning Triggers

- Task/sequence/location changes; new or reassigned employee; different equipment/tool/material; subcontractor/adjacent work changes.
- Weather, wind, lightning, heat/cold, visibility, water, ground, traffic or lighting changes.
- Utility conflict, unexpected material/structure, equipment alarm/defect, control failure, exposure-monitor result or required person unavailable.
- Incident, near miss, public intrusion, emergency, stop-work or employee uncertainty.

Stop and Stabilize

- Stop the affected operation and lower/block/isolate loads and energy when safe. Move employees outside the hazard zone.
- Protect the public/other crews and preserve emergency access. Do not create a second hazard while stopping.

Reassess

- Return to the work location with affected employees; identify what changed and why the prior controls no longer fit.
- Obtain required competent/qualified/RPE/owner input and update permits/plans/inspections as applicable.
- Revise the plan with new steps, hazards, controls, responsibilities, stop triggers and emergency actions.

Rebrief and Restart

- Explain revisions to everyone affected, including late workers/subcontractors; verify understanding and document the update/time.
- Restart only after controls are installed/verified and authorized reassessment is complete.

Minor Versus Material Change

- Even a seemingly minor change requires pause and discussion if it can affect exposure. Material changes are documented as a new/revised plan.
- Do not erase or rewrite history after an incident; preserve the original and document revision separately.

Learning

- Capture lessons from changes/near misses and update formal JHAS, training or equipment standards where recurring.

9. Multi-Employer Coordination and Handoffs

Before Simultaneous Work

- Identify each employer, supervisor/designee, scope, schedule, equipment routes, restricted zones, hazards created and emergency communication.
- Resolve overlapping crane paths, work above/below, excavations, traffic, utilities, hot work, confined spaces, water, demolition and deliveries before exposure.

Controlling Contractor Coordination

- Provide/obtain applicable site rules, known hazards, emergency plan, permit-space information, traffic plans and restrictions.
- Each employer remains responsible for training and protecting its employees. A subcontractor signature does not transfer responsibility.

Conflicts

- Stop affected work when plans, signals, exclusion zones or sequences conflict. Supervisors resolve and rebrief; employees do not choose the least restrictive plan.
- Apply the more protective lawful control until the conflict is formally resolved.

Shift / Crew Handoff

- Communicate work status, remaining energy/loads, barricades, temporary supports, excavations, permits, monitoring, equipment defects, weather/water and open corrective actions.
- Incoming foreman walks the area and completes a current plan; yesterday's form does not replace today's verification.

Late / Relief Employees

- Before joining, review relevant task steps, hazards, controls, emergency actions and changes. Record participation on the current plan or makeup briefing section.

Visitors and Delivery Drivers

- Provide concise site-specific briefing and escort/spotting as required. Include their unloading/movement in the crew plan when it affects work.

Communication

- Define radio channel, hand signals, emergency stop, lead signaler/spotter and language method. Loss of communication is a stop-work trigger.

10. Training, Documentation and Program Review

Training

- Train foremen and employees on purpose, plan/JHA distinction, task-step analysis, hazard categories, hierarchy of controls, change triggers, stop-work and form use.
- Use practical bridge/highway scenarios and verify understanding. Toolbox talks supplement but do not replace this training or required task training.

Documentation

- Record project/location, date/shift/time, work/task steps, hazards, controls, responsible persons, required documents/roles, emergency actions, crew participation and revisions.
- Keep the plan accessible at the work area. Upload/store it in the company-designated system, including Raken when required by company/project procedure.
- Employee signatures document participation and understanding; the leader records questions, unresolved items and corrections.

Quality Review

- Foremen review in field; project management periodically samples plans for specificity, crew involvement, control verification and closure of actions.
- Do not grade quality by number of hazards or signatures. Evaluate whether the plan changed how the work was safely prepared/performed.

Records

- Retain according to company/contract schedule and preserve after an incident, exposure, regulatory request or litigation hold.
- Formal JHAs remain controlled documents with revision/approval history. Do not retain obsolete plans as active instructions.

Program Improvement

- Analyze recurring hazards, stop-work events, near misses and plan deficiencies. Update JHAs, toolbox talks, equipment and procedures.
- Solicit worker input and recognize useful hazard identification/corrections.

Enforcement

- Starting without a required plan, copying a false plan, signing without participation, bypassing a control/hold point or continuing after a change without replanning is subject to corrective action.

Review

- Review this controlled policy at least annually and after a significant incident or regulatory/process change. Printed copies are uncontrolled unless formally issued.

11. Daily Pre-Task Plan / JHA Form - Part 1

PROJECT / JOB	LOCATION / WORK AREA	DATE / SHIFT
FOREMAN / LEADER	CREW / EMPLOYERS AFFECTED	WEATHER / WATER / LIGHT

Task and Required Roles / Documents

TASK / EXPECTED OUTCOME	REQUIRED ROLE, PLAN, PERMIT OR INSPECTION

Task Steps, Hazards and Controls

#	TASK STEP	HAZARD / POTENTIAL OUTCOME	SPECIFIC CONTROL / RESPONSIBLE PERSON
1			
2			
3			
4			
5			
6			

DO NOT BEGIN

All required controls, permits, inspections, competent/qualified persons and emergency arrangements must be ready and verified before exposure.

12. Daily Pre-Task Plan / JHA Form - Part 2

Current Conditions and Readiness

VERIFY / DISCUSS	CONTROL / STATUS
Utilities / overhead lines / locates	
Traffic / internal equipment / spotters	
Ground / excavation / access / housekeeping	
Falls / water / rescue / dropped objects	
Cranes / rigging / suspended loads	
Tools / guards / energy / temporary power	
Chemicals / dust / fumes / noise / hygiene	
Weather / heat / cold / lightning / lighting	
Public / subcontractor / work above or below	
911 location / muster / emergency contacts	

Stop-Work Triggers and Emergency Actions

STOP-WORK TRIGGERS	IMMEDIATE / EMERGENCY ACTIONS

Crew Participation

NAME	SIGNATURE / INITIAL	QUESTION, INPUT OR ASSIGNED CONTROL

Change / Replan Record

TIME / TRIGGER	REVISED CONTROL / ACTION	REBRIEF COMPLETED BY

13. Test Your Knowledge

Circle the best answer. Review missed questions with your foreman before leading or participating in pre-task planning.

1. When is a daily pre-task plan completed? A. Before each active crew begins work B. Only after an incident C. Once per project	2. What does an employee signature mean? A. The company has no responsibility B. Every hazard is guaranteed eliminated C. Participation/understanding, not a waiver
3. What is a formal JHA? A. A payroll form B. Detailed step-hazard-control analysis C. A substitute for all permits	4. Which is the strongest control? A. Eliminate the hazard B. Be careful C. PPE alone
5. What follows a meaningful field change? A. Continue slowly B. Stop, reassess, revise and rebrief C. Use yesterday's plan	6. What makes a control useful? A. 'Watch out' B. 'Use PPE' C. Specific who/what/where/when and verification
7. Does a pre-task plan replace competent-person inspections? A. Yes B. No C. Only on Fridays	8. Who should participate? A. The actual affected crew and relevant roles B. Only office staff C. Only the customer
9. What happens to unresolved required controls? A. Task stays on hold until resolved B. Sign the form and proceed C. Hide them	10. Who has stop-work authority? A. Only management B. Every employee C. Only OSHA

EMPLOYEE: _____

DATE: _____

ANSWER KEY: 1-A | 2-C | 3-B | 4-A | 5-B | 6-C | 7-B | 8-A | 9-A | 10-B