

Safety observation record

Use this form to record ONE observation conversation: you watch a task for a few minutes, say what was done well, and ask the person what makes the work harder or less safe than it should be. Anyone can use it: a supervisor, a worker, a manager, or the host of a visitor or contractor. It is a record of a conversation, not a list of hazards. It is not a safety moment (one message to a group), not a workplace inspection (a checklist for an area) and not an incident report (something that happened); the table on page 2 says how they differ. Doing observations is a voluntary practice and nothing on this form is a legal requirement. The section titles and tick boxes are examples: change them to suit your site.

No names, no blame. You do not need the name of the person observed: write their role, or nothing. Describe what you saw and what got in the way, not who is at fault. If something could be safer, ask first whether it is a condition (equipment, layout, time, a procedure that is hard to follow) before you write it as something a person did. Agree with the people who will be observed how the records are used and who sees them, and say it in your own words. An example to adapt: "These records are used to fix how work is set up. They are not used to assess or discipline individuals."

Not a target. Do not set a number of observations for a person or a team to reach, and do not rank people or teams by their tallies. A quota rewards a quick tick, which is not a conversation. HSE lists a "big brother" or blame-culture perception among the pitfalls of behavioural safety approaches and warns of a bias towards measurable success. Judge the process by what happened after the conversations: actions agreed, closed, and fed back.

1 Observation details

Date and time	Place (site, area, location)	Reference (sheet and line number)
Task observed (what the person was doing, in a few words)		
Observer (name, role)	The observer is a ☐ Supervisor ☐ Worker ☐ Manager ☐ Visitor host ☐ Other	
Role of the person observed (optional, no name needed)	Minutes watched	Others present (roles)

2 What was done well

What was done well (say what you saw, for example the check the person made, not only "good job")

3 What could be safer

Condition or behaviour: what was it mainly? ☐ A condition (equipment, layout, lighting, tools) ☐ A behaviour (what a person did) ☐ Both ☐ Nothing this time
What could be safer (describe it neutrally: "a stepladder stood on a wet floor", not "someone was careless")

4 The conversation

What the observer asked (open questions, for example "What makes this job difficult today?")
What the person said (their words, where you can)
What got in the way (tick any) ☐ Tools or equipment ☐ Time or work pressure ☐ Procedure unclear or out of date ☐ Supervision or help ☐ Noise ☐ PPE fit or comfort ☐ Training ☐ Layout or space ☐ Other

These prompts are examples, taken from the kinds of barrier HSE's guidance lists. Add your own. Write what got in the way as the person describes it, then check it against what you saw.

5 Agreed action and what was done at once

Agreed action, owner and due date (what will change, so that it stays that way)	Action reference
Stop-work or immediate fix needed? ☐ Not needed ☐ Fixed or made safe on the spot ☐ Work stopped until safe ☐ Raised to a manager at once	
What was done, and by whom (if work was stopped or made safe)	

If you see immediate danger, make it safe or stop the work first, and write the record afterwards.

6 Where this goes next

Where this goes next (tick any) ☐ Toolbox talk topic ☐ Procedure or risk assessment change ☐ Hazard or near miss report ☐ Repair or maintenance request ☐ Nothing further
Feedback given to the person observed (date, and what was said or promised)

7 Tally sheet: ten observations

No.	Date	Task observed (a few words)	Safe	At risk	Action raised (reference, or none)
1			☐	☐	
2			☐	☐	
3			☐	☐	
4			☐	☐	
5			☐	☐	
6			☐	☐	
7			☐	☐	
8			☐	☐	
9			☐	☐	
10			☐	☐	
Total		Observations on this sheet			

Tick **Safe** when you recorded no concern and **At risk** when you recorded something that could be safer; write a full record for each At risk line and put its action reference in the last column. The tally is a list of conversations held. It is not a score and not a target: a sheet of ten with no At risk line does not show that the work is safe, because each observation is a few minutes of one task.

8 Reading the sheet

What the At risk lines have in common (tools, time, procedure, supervision, noise, PPE fit or something else)		
Passed to (name, role) and date	Actions closed on time, of those raised	Sheet kept where, and who sees it

9 How this record differs from three others

Record	What it is	What this record adds
Safety moment	A short talk to a group, with one message, one question and one commitment.	A conversation with one person about one task, held where the work is done.
Workplace inspection checklist	A routine look at an area, answered check by check, with a list of findings.	No checklist: it records what was done well, what got in the way and what was agreed.
Incident report	A record of something that happened, written after the event.	A planned look at normal work, before anything has gone wrong.