



Team Building and Kinesthetic Safety Training Enhancement

## **SAFELY HOME – EVERYONE, EVERYDAY**

### **PRE PROGRAM FOOD FOR THOUGHT**

Working with companies such as BNSF, BP and Caterpillar, we have learned 3 simple facts about corporations which have superlative safety cultures:

- They provide safety training on issues beyond the workplace. If they can get employees to think of safety when driving on the freeway to work, playing with their kids, or just turning on the stove at home, just imagine how conscious of hazards they will be when performing higher risk task at work.
- The safety drive is a never-ending commitment from the top down. There must be 100% buy-in and commitment from the Executive Team.
- They have already experienced deaths in the workplace! In fact, this is almost a pre-requisite to having an outstanding culture of safety.

### **EVENT CONCEPT**

By Aaron Zolniac  
**USA TODAY**  
**May 1, 2008**

*As we are living in an increasingly carbon constrained world, it is no surprise that corporations are leading the way as the United States of America strives to become a more sustainable economy and culture. Most interesting are the industries and companies that are spearheading this sustainability movement.*

*After being awarded a contract to provide heavy machinery and related service to the new Dine Open Pit Copper Mine on the Navajo Indian Reservation, \_\_\_\_\_ has announced that it is providing a revolutionary new mine employee transportation system. "This carbon neutral system is not only sustainable, but it will enhance the safety and health of all mine employees" says \_\_\_\_\_'s media spokesperson. This is the first time \_\_\_\_\_ has built, delivered, and serviced a machine of this type. The company plans to soon expand this offering beyond the American Southwest using \_\_\_\_\_ as its model distributor.*

*As a global company, we seek to being actively involved in all the communities it reaches. We believe it is our responsibility to enhance the lives of our neighbors around the world, as a corporation, and as individuals. This product is a prime example of the company's commitment to sustainability and the health of the communities we serve. It will also help us to achieve our "Vision Zero" safety goal" said CEO \_\_\_\_\_ in a news release earlier this week.*

## YOUR TEAM'S ASSIGNMENT

The new Z9000 Employee Transport vehicle has been in service at the mine now for 10,000 hours. After a review of Operator Reports and data from the Fluids Lab, it has been deemed necessary to perform a complete overhaul by the Service Department.

The Z9000 has been disassembled down to the frame and all parts must now be replaced. It is your Team's assignment to prepare your work site, procure all replacement parts/tools, and then complete the re-build. Time is critical as the client needs the Z9000 back in service as quickly as possible and has given us a deadline of \_\_\_\_\_. Please astonish this customer with an early delivery; however you must accomplish this goal while adhering to our stated values. The Service Team which completes this assignment in the least amount of time will receive a bonus.



*Safety – Respect – Integrity – Teamwork – Excellence – Stewardship – Astonishment*

## PROGRAM OVERVIEW

Each Group of participants will be broken up into 8-10 person teams. Each team will be responsible for servicing the needs of its new customer (the Dine Copper Mine) and performing a complete 10,000-hour overhaul of the Z9000 Employee Transport Vehicle (in reality a bike).

The event will begin with each team member being taught a different skill, each skill being crucial to the successful execution of the project.

**PROJECT MANAGER** – This teammate will be in charge of the overall project and will be the only member of the team that will be taught the “big picture” objective of the project/event.

**SERVICE MANAGER** – This teammate will be in charge of all work processes and assignment of duties/tasks to the Service Leads. He/She must plan the schedule of work performed during the project including procurement of parts and the timing of all tasks. This team member is made aware of the parts, tools and job site needs. He/She may never speak directly to Service Techs. Only communication with the Service Lead or the group as a whole is allowed.

**SAFETY MANAGER** – This teammate will work closely with the Service Manager and Service Lead to ensure that all safety policies, procedures and practices are closely adhered to. While he/she may not actually perform tasks such as the pre-work JHA or procurement of the PPE's, he/she must ensure that it takes place. He/She must ensure that their team follows best practice safety in all elements of the project, from work site prep to PPE to Hand Held Tool Safety. He/She may never speak directly to Service Techs. Only communication with the Service Lead or the group as a whole is allowed.

**SERVICE LEAD** - The Service Lead is responsible for assuring that the service techs follow all policies, procedures, bike building/worksite prep, available SOP's on BikeSys and as directed by the Service Manager. Only the Service Lead may speak with the Service Manager.

**SERVICE TECHNICIANS (2)** – These teammates are responsible for the actual hands-on servicing and overhaul of the bike. They receive basic training on bike building and receive all project and service directives from the Service Lead.

**NEW HIRE SERVICE TECHNICIANS (2)** – This teammate will not receive any specific skill training, but must be incorporated into the process by the Service Lead and Techs. Their Skill Station will consist only of training on your Values, Company History, and a Business Unit overview.

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## ULTIMATE GOAL

All bicycles will be judged on time and the quality of the re-build. Additionally, each team will receive fines for failure to adhere to our values and Safety – fines will be given out by the MSHA Inspector in the form of “time penalties” which will be added to the team’s overall time. The scoring will be weighted to over-emphasize Safety and Values, and time penalties will be given to the team at 1) the halfway injury break, and 2) upon delivery of the finished re-built Z9000.

## SCORING FORMULA

***Time of rebuild + Quality of Rebuild\*\* + MSHA violation time penalties/fines = Final Time***

\*\*Teams will also receive time penalties for improper install of specific components (i.e. 5 min for loose handlebars, 15 min for improper tire pressure,...)

The team with the lowest time wins.

## SAMPLE TWISTS

We will incorporate a number of safety and culture related elements into the process. These twists are designed to encourage participants to make strategic decisions that balance Safety considerations with Time whips. Some of these include:

- Cash Bonuses for “Best Practice” safety behavior and interventions – discreetly handed out by Observer
- The Service Tech that will be “injured” and removed from the team will be the one that shows the greatest aptitude for building the bike.
- The Safety Manager, Project Manager and Service Manager will be physically removed from the team after the initial Team Strategy Meeting. All further communication may take place only via meetings with the Service Lead who must drive their agendas, policies, and procedures through to the Service Tech team members.
- A resource station (Bikesys) with task training, detailed SOP’s, MSHA Safety Regulations, and directions will be provided at an off work site location.

## BRIEF SAMPLE TIMELINE

5 hours total including lunch.

7:45 am	Participant Arrivals
8:00 am	Event Introduction
8:05 am	Skill Stations
8:25-10:00 am	Bike Building
10:00 am	Break
10:10 am	Individual Team Discussions
11:00 am	Break
11:10 am	Group Discussion – Observers share top 3 themes, lessons, or learning’s with entire group
12:00 pm	Closing 15-20-minute time buffer if necessary
12:30-1:30 pm	Lunch / Observer Download Debrief and action plan

## PROGRAM SEGMENT OVERVIEW

### Event Introduction

As the participants enter the facility, they will each be handed colored bandannas with animal stickers affixed to them. Although they will not know it at the time, the color of the bandanna will indicate their team and the animal will indicate their assigned skill. Once everyone has received their bandanna, we will begin the event introduction (*this is the best time for a welcome video/introductory*). The introduction is very brief by design, simply outlining the day's schedule, goals, and expectations of the participants.

5-10 minutes – more if presentation requires.

### Skill Stations

Immediately upon conclusion of the introduction, AOA's staff will hold up signs matching the animal stickers. The participants will be instructed to move to the sign that matches their sticker. Here they will be told by an AOA facilitator that they are, in fact, not a Gila Monster, Coyote, etc instead they are their team's one and only Service Technician, Safety Manager, Service Manager, etc. Accompanied by a handout, AOA's facilitators will teach each participant their skill and how their particular skill will be critical to their team's success in the following exercise.

15-20 minutes



### Bike Building

After the skill learning period, the team members will regroup around their Project Managers and hold a strategic planning session. Starting with just an assigned task of overhauling the Z9000 and the frame, (but no materials, tools, safety equipment, or bike parts) teams must formulate a plan that will allow them to build the best bike in the least amount of time, while adhering to your values, safety standards, and best practices.

For the next 90 minutes, teams will procure materials from internal suppliers, design and construct their work area, plus build and deliver their bikes. There will also be a work stoppage due to an injury (finger amputation), during which teams will have to complete all injury related reports, a root cause analysis, loss of a worker, and a re-training session. Additionally, after initial delivery, the teams will have to service their client when problems arise with the bike and safety modifications are required.



### SAMPLE TEAM PROCESS

1. **Team Planning Meeting:** Project Managers will gather their team at their designated work site and explain to them the project, plus how their individual (newly learned) skills will be incorporated.

2. **At the sound of the Air horn** all Project Managers, Safety Managers, and Service Managers must report to their "management offices" which are separated from the work site.

3. **The Service Lead should meet with the management team.** The Service Manager must provide direction regarding parts, job site materials, and tools procurement. The Safety Manager should step in to ensure that PPE and jobsite safety needs are met during the planning and procurement process. The Project Manager should provide overall direction on how to ensure that the team "wins" the challenge.



4. **The Service Lead should have been directed by the Service Manager** to visit Bikesys and collect relevant materials, plus the requisite MSHA and safety considerations for the task(s).

5. After this meeting, **the Service Lead should incorporate the safety needs** into the initial project plan (procure PPE, procure proper tools for the job and safety devices, procure job site safety items, perform a pre-work JHA, develop SOP's, consult Bikesys, etc) and share this plan with the Service Techs.

- **Tool Shop:** In this location, a wide variety of tools are available to each team. Some are the proper tools for the job, some are old or damaged, and some are unnecessary or improper (example: hammer or adjustable wrench). If the team has consulted Bikesys prior to visiting the tool shop, it will have a list of proper required tools for the job. The tool shop staff will "role play" to try to encourage unsuspecting teams to utilize unnecessary or improper tools in order to "save time and money".

- **Parts Department:** This location will have a wide variety of bike parts available to each team. Once again the team that has not consulted Bikesys will be encouraged to take many unnecessary or improper parts. Additionally, optional "Safety Add-ons" will be available.

- **Jobsite Supply:** In addition to obvious items such as bike work stands, there will be a variety of signage, lock out/tag out, work area designation, and other materials to enhance both work efficiency and safety. Teams must make decisions about what they "need" for their job site.

- **Personal Protection Equipment Warehouse:** Items listed on Bikesys and in the Safety Manager's skill packet will be available to the teams at this location.



6. **When the teams are ready to perform the re-build of the Z9000 and the procurement process is complete**, the Service Leads should meet with management to review the "next steps". For example: teams should perform a JHA covering: work zones, hand held tool safety, Hazcom, team member roles, and particular safety considerations for the task.

7. **The Service Lead should share all information** gathered from management and Bikesys with the Service Techs and a modified work plan should be agreed upon, tasks assigned. Work commences with the procurement and job site preparation process

#### 8. **Bike Build Snapshot:**

*Example: Chain - The Service Technicians (ST) must install a new chain on the Z9000.*

- Based on the SOP for a general Z9000 overhaul, the Service Techs must first ensure they are performing this task in the proper order within the entire overhaul task sequence.
- ST's must review the Bikesys section on chain replacement to get the part # as the parts department has many different chains and chain lengths to choose from. Additionally, Bikesys will provide direction as to which tools will be required for this task.
- ST's must perform a JHA for the task and assign roles for the install. Also, a re-check of their jobsite and PPE is recommended before commencing work.
- ST's must perform the chain install by following the Bikesys directives (not an easy task!)
- ST's must lube and test the drive train to ensure that the chain is properly linked together and functional.
- Move on to the next overhaul task – Service Leads may work ahead to ensure that parts and tools are ready for the next task.

9. **Once the work has commenced** and the re-build has reached its approximate half-way point (rear wheel installation), the team Observer/MSHA Inspector will announce a "**WORK STOPPAGE**". At this time the Observer/MSHA Inspector will handout fines for all safety violations observed to this point, plus announce that one of the team's Service Technicians has just incurred a finger amputation.

**The teams must then follow the standard protocol for a job site injury** (Hand out provided to Safety Manager in Skill Station):

- Stop Work!
- Care for injured party – triage equipment/first aid kit (did they procure one?)
- Call 911
- Transfer injured party to the triage nurse.
- Report accident to supervisor / Service Lead / Service Manager
- Supervisor to complete Incident Report (Take photos)
- Supervisor ensures a substance screening test is completed
- Employee Incident Statement by injured employee
- Fill out witness reports
- Supervisor to perform root cause Investigation
- Deliver all documentation and forms to the Safety Manager
- Re-training on Hand Held Tool Safety
- New JHA
- Reporting the cost of this accident
- Re-commence work

10. **With a renewed commitment to safety** (and with one less Service Tech), teams must complete the re-build and deliver the bike to the mine/client.

11. **Upon delivery, the Mine will inform the team** that upon conducting their own interviews with the Z9000 operators they have determined that a few safety modifications need to be performed: New flat resistant tires/tubes and training wheels must be installed before returning the Z9000 to service at the mine. The original timeline is still in place. NOTE: Bikesys will have a recommendation that the new tubes and training wheels be installed during the next service, therefore teams that carefully utilize Bikesys will have already made these modifications in the original rebuild.



12. **Scores will be calculated.**  
90 minutes

**NOTE: THIS PROGRAM IS HIGHLY FLEXIBLE AND CAN BE MODIFIED IN MANY WAYS TO FIT YOUR CORPORATION'S PARTICULAR BUSINESS. ADDITIONALLY, SEEMING CORE ITEMS TO THE PROGRAM CAN BE EASILY CHANGED AS PICTURED BELOW:**





## DEBRIEF

### **Individual Team Discussions**

These will begin with each participant filling out a Self-Assessment Form followed by a group discussion of the team's safety practices, values adherence, and performance. Each team will have been assigned an observer from the most senior leadership team available. These observers will accompany the team through the entire event. They will be trained prior to the event by AOA on techniques for their post-event debriefing session with their assigned team. The observers will lead a discussion on safety and how it relates to your new safety culture.

45 minutes

### **Entire Group Discussion / Sharing of Lessons Learned**

After each team finishes their debrief session, the observers will share with the entire group the top three themes, lessons, or learnings from their team's discussion. (Simultaneously projected).

45 minutes

### **Closing**

AOA's Lead Facilitator and your Training Lead will provide closing comments and take home messages.

5 minutes

### **Lunch, Party, or Finished**

Lunch or a post event party allows for peers to informally discuss how the messages and lessons learned from the event can be applied to their specific jobs.

### **Observer Debrief Session**

After each training session, all observers will participate in a private discussion, highlighting their observations of the participants' behaviors and practices. From those observations, the observers will create an action plan focused on enhancing your new safety culture throughout all company's departments.

The observer from each team will attend a group discussion/debrief lead by AOA's lead Facilitator. Here observers can share in a private setting their candid observations regarding each team's performance. Themes, trends and previous event data will be used to create action plans for the upcoming events and most importantly the company's safety policies, procedures, training, and culture.

60 minutes

### **Post Event Actionable Measurement – Safety, Value and Attitude Metrics**

AOA will collect and digitize all data from these sessions for review and ongoing directional assistance of the plan of action for the Safety Culture shift. This will include everything from violations per participant to items documented in the debrief sessions.

## **MISCELLANEOUS ITEMS**

### **Individual Cash Bonuses -"Never Walk Past an Unsafe Act"**

Make it rewarding and "cool" to intervene. Observers will be bankrolled with \$20 bills. Each time a participant intervenes on a safety issue (except the Safety Manager), he/she will receive \$20.

### **Community Service**

All bikes will be donated to an organization of your choice: the recipients can be invited to receive the donation directly from the participants.