

Toolbox Talk Monitoring Procedure

Purpose

To establish a consistent method for monitoring the delivery, effectiveness, and continued relevance of Toolbox Talks. This procedure ensures that health, safety, and operational information is effectively communicated to employees, that Toolbox Talks are understood and applied, and that content remains current, relevant, and aligned with Lothian's risk management priorities.

Scope

This procedure applies to all departments within Lothian and covers the identification, approval, development, delivery, monitoring, and review of Toolbox Talks. It applies to all employees and managers involved in preparing, delivering, or receiving Toolbox Talks.

Process

1. Identification of Need

A new or revised Toolbox Talk should be considered when:

- New work activities, equipment, processes, or substances are introduced that require employee awareness or instruction
- An incident, near miss, inspection, audit, or risk assessment identifies a gap in understanding or unsafe behaviour
- Legislation, regulation, Approved Codes of Practice, or industry guidance changes
- Seasonal, environmental, or temporary risks arise that require targeted communication
- Repeated unsafe acts, trends, or knowledge gaps are observed among employees or contractors
- A corporate safety campaign, initiative, or Operational Standard requires reinforcement at workforce level

2. Proposal

Any employee or manager may propose a new or revised Toolbox Talk by submitting a proposal to the H&S Manager. The proposal should include:

- The topic or issue identified
- A brief description of affected activities, locations, or employee groups
- The reason for the proposed Toolbox Talk (e.g. new risk, incident learning, change, campaign)
- Suggested key messages or learning outcomes

3. Evaluation and Approval

The H&S Manager will review all proposals and determine whether:

- The topic is already covered by an existing Toolbox Talk
- An existing Toolbox Talk can be updated rather than creating a new one
- A new Toolbox Talk is justified based on risk level, frequency, and workforce relevance

- The proposed content aligns with legislation, industry guidance, and Lothian Operational Standards

If justified, the H&S Manager will approve development of the Toolbox Talk and assign responsibility for its creation.

4. Development and Issue

Approved Toolbox Talks will be developed using the Lothian Toolbox Talk template, which will include:

- Topic title and purpose
- Key safety and operational points
- Required controls and expected behaviours
- Discussion questions to encourage engagement
- Attendance and acknowledgement record

Once reviewed and approved by the H&S Manager, Toolbox Talks will be issued to relevant departments, communicated to managers for delivery, and recorded in the Toolbox Talk Register.

5. Delivery and Monitoring

- Managers and Supervisors are responsible for delivering Toolbox Talks to relevant employees and ensuring participation.
- Delivery should allow time for discussion and questions to confirm understanding.
- Attendance records must be completed and retained in line with document control requirements.
- The H&S Department may monitor delivery and effectiveness through spot checks, audits, inspections, or workforce feedback.

6. Review and Continuous Improvement

- Toolbox Talks will be reviewed periodically, or sooner were prompted by incidents, legislative change, audit findings, or operational change.
- Monitoring results, feedback, and incident trends will be used to assess effectiveness.
- The decision to create, revise, reissue, or withdraw a Toolbox Talk, including justification, will be recorded by the H&S Manager.

Records

Records associated with Toolbox Talks, including proposals, approved content, attendance records, and review decisions, will be retained in accordance with Lothian document control and record retention requirements.