Toolbox Talk - Managing Change Safely

Todd Jerome Jenkins | v2.0 | October 13, 2026 | 5–10 minutes plus field checks

What and why

Change management prepares people, instructions, resources and protection for the transition to a different arrangement. A planned change has a transition period: people may have different instructions, equipment may be partly replaced and a control owner may be unclear. Prepare that period as carefully as the final arrangement.

Objective: Explain a planned change's transition, affected controls and release conditions, then verify readiness before relying on the new arrangement.

When and where

Before changes to equipment, staffing, work methods or responsibilities, including temporary changes. At every affected interface and shift, not only the team proposing the change.

How to use it

- Define what changes and who is affected. Use the applicable approval process and involve the people doing the work.
- Plan protection before, during and after the switch. Assign hold points, checks, communication and release authority.
- Confirm readiness and an approved contingency. Returning to the old arrangement also needs appropriate review.

Verify It in the Field

Arrange paper cards labeled before, transition and after. Identify any stage with no control owner or current instruction.

For the real change, compare completed checks with the governing requirements. Installation and a training invitation do not establish readiness.

Ask affected workers to explain the next authorized step and restrictions. Record actual results and review usability after implementation.

Failure points and stop triggers

Old and new instructions mixed; affected crews omitted; protection removed too early; incomplete installation; unclear control ownership; training assumed; a successful first use mistaken for completed follow-up. Hold the switch or affected work for missing approval, incompatible instructions, unverified protection or an uncovered transition stage. Use the defined safe-state and notification process.

Toolbox talk questions

1. Where could protection be lost during this transition?

2. Who decides that the next stage is ready?

3. What evidence will we review after the switch?

Use the separate supervisor field check and attendance sheet. Practice is not qualification or work authorization.

Source: DOE-HDBK-1028-2009, Vol. 2, printed pp. 93–94. References and task-specific limits on the webpage.

Next step: Apply this skill to one step on the free JHA/JSA field-verification worksheet.

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/change-management-transition-readiness

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