See the crew. Protect the team.

Leader's guide | Equipment visibility and ground-crew communication

SFM is an equipment management consulting firm. We keep the safety of every operation's most valuable asset - the team - in mind. This kit focuses on people working around equipment.

Optional SFM resource. Adapt the exercise to the machine, worksite and employer procedures. It supports a discussion; it does not certify competence or replace required training or safeguards.

1 Prepare a controlled demonstration

Have the meeting leader and an experienced operator select a level area separated from live work. Secure the actual machine using the manufacturer's procedure: parking brake set, engine off, blade and attachments lowered, and unintended starting or movement prevented. Review appropriate PPE and safe cab access. Define boundaries and keep the crew clear while any demonstration vehicles are repositioned.

2 Experience the operator's view

Give each ground crew member a turn in the operator's seat. Under the leader's control, position people, poles or cones at planned locations to reveal blind spots. For a grader, discuss workers on windrows behind it and grade stakes ahead. Use the actual seat position, mirrors and available cameras. Keep the grader stopped throughout. This is familiarization, not permission to operate it.

3 Agree how the crew will work

Plan separation of people from moving equipment first. With a spotter, ground crew maintain eye contact with the spotter, who can see everyone in the operating area and stays in radio communication with the operator. Without a spotter, where permitted, ground crew maintain eye contact with the operator or remain outside the equipment work zone. Identify one person directing movement and agree on signals.

4 Stop, account for everyone, reconnect

If anyone in the work zone disappears from view or communication is lost, the operator immediately stops all machine movement. Account for everyone, restore communication and confirm the area is clear before resuming. Use the pause as a whole-crew teaching moment. Do not omit a spotter where one is required; see the cited rules on page 4.

If you can't see my eyes, I can't see you.

Eye contact alone is not permission to approach. Get acknowledgment before entering the equipment work zone.

Teach-back: Who directs movement? What is our stop signal? Where can people wait safely? What must happen before movement resumes?

Plan the meeting and the work.

Complete the details and record what the crew reviewed. Check boxes only after discussion.

Meeting reference

Date (YYYY-MM-DD)

Start time

End time

Company / agency

Site / location

Meeting leader / foreman

Equipment operator

Machine type / make / model

Equipment / unit ID

Designated spotter / or record why not applicable

Radio channel / call sign

Task-specific PPE and safe access plan

Setup and discussion review

- [ ] Controlled demonstration area and boundaries reviewed
- [ ] Machine secured; unexpected start/movement prevented
- [ ] PPE and safe cab access reviewed
- [ ] Blind spots, travel paths and crew locations reviewed
- [ ] Spotter/operator roles, radio and signals agreed
- [ ] Stop, head count and restart confirmation rehearsed

Work-zone boundaries, safe waiting areas and crew locations

Blind spots observed on this machine / what surprised the crew

Crew members present

Record everyone attending. Names are attendance records; initials are optional, not a qualification certificate or digital signature.

Keep this page with the meeting details. Use another copy of this page for additional crew members; enter the same meeting reference below.

Meeting reference (same as page 2)

Meeting date (same as page 2)

#	Crew member name	Employer / role	Initials*
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			

Total crew present

Additional attendance pages attached

*Initials are optional.

Agree the follow-through.

Capture the crew's understanding, actions and restart agreement. This is a meeting record, not an equipment clearance.

Agreed stop word / signal and how it reaches the operator

Who accounts for the crew and confirms that movement can resume?

What did the crew learn, and what will change?

Follow-up actions

Record a person responsible and a target date. Do not use this form to authorize unsafe work.

Action	Responsible person	Target date

Meeting record reviewed by (name)

Review date

Official requirements and optional background

Cal/OSHA - 8 CCR 1592(a), (b) and (e)

For covered hauling vehicles, subsection (a) requires a signaler during backing in congested areas or high ambient noise that obscures the alarm. Subsection (b) addresses other hazardous, rear-obstructed backing operations. Subsection (e) requires controls so operators know workers on foot are present.

https://www.dir.ca.gov/title8/1592.html

Cal/OSHA - 8 CCR 1509(e) (construction)

Supervisors must conduct tailgate/toolbox safety meetings, or equivalent, with their crews at least every 10 working days. This construction provision does not make the SFM form mandatory.

https://www.dir.ca.gov/title8/1509.html

NIOSH - equipment visibility resources

Optional training background. Published diagrams illustrate specific equipment configurations; confirm visibility on the actual machine. They are not a site-specific clearance map.