

**SMART Competency Checklist - Buddy System**

During the COVID-19 pandemic, a *SMART Buddy System* has been implemented as part of the contingency plan. SMART Buddies use this checklist to guide them as they mentor/coach workers. The SMART Buddy is not deemed a SMART trainer through this approach. A SMART trainer will be a key support to ensure staff feel safe and supported should they have questions, need help, etc.

**Documentation:** The SMART Buddy documents their findings on this checklist. A copy of this completed form is then provided to the manager/supervisor.

**Communication:** The manager/supervisor discusses competencies with the worker and develops a plan to assist the worker in areas identified as needing attention.

**Additional considerations:**

- The duration of being a SMART Buddy on the job depends on the tasks being performed; it may be completed in more than one observation session.
- Tools/resources: a pen, copy of the checklist for each worker, and a clipboard

Post COVID-19 workers would then complete the SMART training program, taught by a SASWH approved SMART trainer, and then receive their certificate of completion.

Evaluation date: \_\_\_\_\_ SMART Buddy name: \_\_\_\_\_

Worker name: \_\_\_\_\_ Supervisor name: \_\_\_\_\_

Type of Moving Task Observed/Coached/Mentored (check all that apply): <input type="checkbox"/> Golfer's <input type="checkbox"/> Partial Squat <input type="checkbox"/> Tripod <input type="checkbox"/> Diagonal <input type="checkbox"/> Power <input type="checkbox"/> Repositioning <input type="checkbox"/> Pushing/pulling				
<b>Rating Key:</b> <b>C:</b> competent <b>D/N:</b> development needed <b>U/A:</b> unable to demonstrate <b>N/A:</b> not applicable Circle the appropriate rating for each section				
<b>SMART risk assessment completed prior to the move</b> (identified risks are eliminated or managed)				
<b>Self</b> <ul style="list-style-type: none"> <li>▪ Physical Status (previous injury/illness/surgery; height-weight relative to client/other workers; safe body mechanics; good posture; physical fatigue; physical fitness; nutrition; stimulant/depressant usage; clothing)</li> <li>▪ Emotional Status (stress; emotional fatigue)</li> <li>▪ Training and Experience (assessment and decision making; ability to perform the move; attitude and approach; observation, awareness, focus; policies and OH&amp;S legislation)</li> <li>▪ Communication Skills (with other workers, client/family; vision and hearing)</li> <li>▪ Workload (time to safely perform the move; availability of assistance; extended shifts)</li> </ul>	C	D/N	U/A	N/A
<b>Environment</b> <ul style="list-style-type: none"> <li>▪ Potential for Violence/Aggression (client/family/visitors; other workers)</li> <li>▪ Room/Area (size/layout; doorway; floor; clutter; furniture; climate)</li> <li>▪ Colours/Lighting (colours; lighting; shiny surfaces; shadows; contrasts)</li> <li>▪ Noise/Distractions (technology/entertainment/events; conversation; voice tone; distractions)</li> <li>▪ Working Surfaces (level/stability; height/width; friction)</li> </ul>	C	D/N	U/A	N/A
<b>Equipment</b> <ul style="list-style-type: none"> <li>▪ Quantity (accessible)</li> <li>▪ Capacity (ability)</li> <li>▪ Quality (function; maintenance)</li> <li>▪ Design (ergonomically correct; adjustable)</li> <li>▪ Manufacturer's Intended Use (limitations)</li> </ul>	C	D/N	U/A	N/A
<b>Object and task</b> <ul style="list-style-type: none"> <li>▪ The Object (size/shape; weight; texture; contents; handles; balance; temperature)</li> <li>▪ The Task (location; distance to be moved; force to initiate, maintain or stop movement; frequency/repetition)</li> </ul>	C	D/N	U/A	N/A

<p><b>Preparing for the moving task</b></p> <ul style="list-style-type: none"> <li>▪ The worker(s) has on the appropriate footwear and other personal protective equipment necessary (e.g., gloves).</li> <li>▪ The plan for the move is in place:           <ul style="list-style-type: none"> <li>▪ Appropriate equipment required is available for use.</li> <li>▪ Assistance is obtained for either moving the object or managing the environment/equipment (e.g., holding a door open, bringing equipment closer).</li> <li>▪ The worker(s) and assistants roles have been clarified and communicated.</li> <li>▪ The “1-2-3-command” has been determined.</li> <li>▪ The route is planned.</li> <li>▪ The second location has been prepared for the remaining task.</li> <li>▪ The pathway is clear of any obstacles, lighting is adequate, noise is minimized.</li> </ul> </li> <li>▪ The worker(s) ensures clear visibility to start and perform the move (e.g., load height and width).</li> </ul>	C	D/N	U/A	N/A
<p><b>Performing the moving task</b>          The worker’s duty is to:</p> <ul style="list-style-type: none"> <li>▪ provide clear direction to those involved in the moving task</li> <li>▪ obtain assistance if identified in the risk assessment process</li> </ul> <p>The assistant(s) duties include:</p> <ul style="list-style-type: none"> <li>▪ managing the equipment, such as positioning the cart and ensuring brakes are locked</li> <li>▪ ensuring equipment does not interfere with the safety of the moving task</li> </ul> <p>All workers involved in the moving task:</p> <ul style="list-style-type: none"> <li>▪ ensure safety of the moving task by being aware, observant and clearly communicating with each other before, during and after the moving task</li> <li>▪ stop the moving task when they identify any risks that may jeopardize the safety of the moving task</li> </ul>	C	D/N	U/A	N/A
<p><b>Safe Body Mechanics Used Throughout the Moving Task</b>          Safe stance: feet shoulder width apart (parallel or stride stance)          For the top: ears over shoulders; shoulders over hips          For the bottom:</p> <ul style="list-style-type: none"> <li>▪ bend at the knees (e.g., soft knees)</li> <li>▪ bend at the hips</li> <li>▪ “sit” into it (buttocks move down and back)</li> <li>▪ tighten core (i.e. abdominal muscles)</li> </ul> <p>Safe effective grip:</p> <ul style="list-style-type: none"> <li>▪ wrists in neutral position (wrists aligned with forearm)</li> <li>▪ elbows close to sides</li> <li>▪ thumbs up or out</li> </ul> <p>Comfort zone</p> <ul style="list-style-type: none"> <li>▪ vertical zone: area between the shoulders and thighs (where the fingertips touch the thighs when standing in an upright posture); and,</li> <li>▪ horizontal zone: area in front when your elbows are at or near a 90 degree angle and are close to sides</li> <li>▪ keep the load close</li> </ul> <p>Weight transfer: side to side; front to back</p>	C	D/N	U/A	N/A
<p><b>Completing the moving task</b></p> <ul style="list-style-type: none"> <li>▪ object safely positioned and secured</li> </ul>	C	D/N	U/A	N/A
<p><b>Following completion, evaluate</b></p> <ul style="list-style-type: none"> <li>▪ did the move compromise the workers safe body mechanics</li> <li>▪ did the worker feel the load was too heavy, awkward?</li> <li>▪ was the load somewhat unstable during the move?</li> </ul>	C	D/N	U/A	N/A
<p><b>Communication/documentation</b></p> <ul style="list-style-type: none"> <li>▪ what went well</li> <li>▪ how risks were eliminated or managed</li> <li>▪ what the recommended moving technique should be</li> </ul>	C	D/N	U/A	N/A
<p><b>Communication/documentation</b></p> <ul style="list-style-type: none"> <li>▪ what went well</li> <li>▪ how risks were eliminated or managed</li> <li>▪ what the recommended moving technique should be</li> </ul>	C	D/N	U/A	N/A

**Signatures**

SMART Buddy: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Provide comments on what went well, what needs to be improved along with recommendations.

**Action Plan:**

topic/area	notes/timeline/etc.
communication of positive feedback with worker	
communication of requirement for areas to improve	
plan to achieve required improvements and timeline	
other	

Supervisor shared with SMART Instructor (name): \_\_\_\_\_