

Competency Assessment and Review

Ensuring your Safety II programme is robust and fit for purpose

Introduction

Safety professionals play a critical role in implementing and maintaining safety systems that align with both industry standards and regulatory requirements. The adoption of Safety II, a proactive approach to safety that focuses on ensuring things go right rather than just preventing things from going wrong, has become a critical part of modern safety management practices.

Objectives

This framework is designed to develop the skills of safety managers and advisors to implement Safety II theory effectively. By doing so, they ensure their teams are working successfully and safely, while adhering to the intent of the **Institute of Directors Good Governance Guidelines** plus **recent case law**.

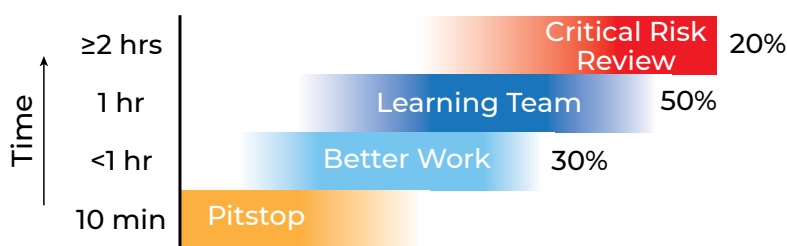
This competency framework provides a structured pathway for developing the skills necessary to apply Safety II principles and facilitates the assessment of safety team competence with:

- Human & Organisational Performance Coaching
- Learning Teams
- Critical Risk Analysis using Safety II principles

Outcomes

- Review of your framework to meet current best practice in critical risk management.
- Upgrade tools, guidance and training material to embed application.
- Assess competency of facilitators and coaching to maximise efficacy.
- Establish competency guidelines for facilitators at all levels.
- Review safety management systems for opportunities to capture Safety II learnings.

LEARNING TEAM GUIDANCE



Post event potential severity	Observations & (notifications)	Minor	Moderate	Serious and above
Proactive learning (periodic)	Understanding conditions - weak signals - success - ideas	Understanding work & success - conditions - capacities & demands - weak signals	Understanding work & success - conditions - capacities & demands	Understanding critical steps/controls - Damaging energy - Critical risks - Critical controls and supports
Who facilitates	Anyone, team supervisor	Anyone, team lead	Trained facilitator	Trained facilitator

Framework Overview

The framework follows a three-stage approach to develop competence in applying Safety II principles:

Stage 1: Learning the Concepts and Theory

This stage focuses on equipping teams with a comprehensive understanding of Safety II concepts and how they align with legal and regulatory requirements. Team members will develop knowledge of key principles. Case studies will be utilised to exemplify how these principles can be implemented in practice.

Key Skills Acquired:

- Mentoring leaders with Human & Organisational Performance Coaching
- Facilitating Learning Teams to improve collective problem-solving
- Conducting Critical Risk Analysis based on Safety II principles

Stage 2: Supervision & Mentoring

During this phase, teams will receive guidance from a competent mentor, ensuring they are applying Safety II principles in their work. Peer reviews and self-assessments using competency descriptors will support the learning process. Teams will also participate in group mentoring sessions for reflection, learning, and mutual support.

Key Activities:

- Peer reviews and self-assessment using competency descriptors
- Group mentoring and reflection sessions

Stage 3: Assessment and Competency

The final phase involves formal assessment of team members to determine their level of competence in applying Safety II principles. Teams will be evaluated and certified as competent at one of the following levels:

- Starter
- Competent
- Advanced

The assessment is structured as follows:

LEVEL	FACILITATOR	RECOMMENDED ASSESSMENT
1	Pitstop	Sit in Self assessment with coach
2	Better Work Starter Facilitator	Review one previous report Sit in Self assessment with coach
3	Learning Teams Competent Facilitator	Review three previous reports Sit in Self assessment with coach
4	Learning Reviews Advanced Facilitator	Review five previous reports Sit in Self assessment with coach

About your Facilitator



Moni Hogg, a qualified assessor, brings 10 years of experience implementing Safety II and Learning Teams across a broad spectrum of industries.

She has 20 years experience in health and safety with a background in construction management. She holds a qualification in Adult Education, has a business degree, and is NEBOSH certified.

Nationally recognised for her work in Safety Differently/Safety II, Moni has led innovative safety initiatives for organisations like Rocket Lab, Fletcher Building and Horticulture NZ.