

MODULE 5

SAFETY AND HEALTH TRAINING

At the end of this module, you will be able to...

- Identify the factors OSHA includes under *safety and health training* in its voluntary Safety and Health Program Management guidelines.
- Identify the goal and function of safety and health training.
- Identify the scope of safety and health training.
- Identify the various methods you can use to train, and determine when it is appropriate to use each method.
- Use a process for providing on-the-job training.
- Use tailgate meetings as a method for training employees.
- Identify ways to integrate training into everyday job functions.
- Identify free or inexpensive ways to train employees.
- Identify the characteristics of effective training.
- Assess a case scenario to determine the appropriate training.



OSHA's Guidelines for Safety and Health Training

Directions: The OSHA guidelines outline a number of factors that demonstrate effective safety and health training. Assess your organization by checking the items you feel your organization does well.

- The organization ensures that all employees (managers, supervisors, employees) know what their safety and health responsibilities are.

- The organization ensures employees understand all the hazards to which they are exposed.

- The organization provides employees with the necessary knowledge and tools so that they can avoid being harmed or harming others.

- The organization ensures that supervisors and managers understand their responsibilities and the reasons for them so that they can carry out their roles effectively.

- The organization ensures that employees get periodic refresher training in safety and health topics.

- The organization ensures employees know how and where to get emergency care.

- The organization ensures employees know about the medical program and how to use it.

Note: The above checklist can be helpful during your efforts to build a safety management system. The list can be found as part of a larger consolidated checklist on your *Tools and Resources* CD.

The Goal and Function of Safety and Health Training

Goal of Safety and Health Training

The goal of safety and health training is to provide all employees with the knowledge and skills necessary so that they can perform their work without injuring themselves or others. All managers and employees must receive education in order to understand the requirements of effective safety and health protection. The training goals at each level will be different.

Safety and Health Training Goals for Top Management

- Integrate the safety and health program into the business operations and strategies.
- Brainstorm ideas for safety and health management with other business leaders.
- Create a safety and health culture in the organization.
- Manage performance to get excellent safety and health results.

Safety and Health Training Goals for Supervisors

- Practice participative management.
- Set safety and health goals.
- Exercise good listening and communication skills when employees bring them problems and suggestions.
- Recognize hazards on their own jobs as well as on the jobs of their employees.
- Identify controls for their own jobs as well as for the jobs of their employees.
- Manage the safety and health performance of employees.
- Identify and correctly use regulatory requirements and internal safety policies and procedures.

Safety and Health Training Goals for Employees

- Perform in their jobs safely and properly.
- Recognize the hazards they face on the job.
- Identify the process to use for bringing hazards and other safety concerns to the attention of management.
- Brainstorm ideas for improving safety on the job.
- Identify controls for their jobs.
- Perform self inspections of their work areas.
- Remind their co-workers of the importance of working safely.
- Identify and correctly use regulatory requirements and internal safety policies and procedures.



Scope of Safety and Health Training

There are numerous training topics that can provide the knowledge and skills required to accomplish the goals on the previous page. The following chart shows some of the key training topics that would give employees at each level of the organization the knowledge and skills they need in each of the following safety and health categories.

Category	Top Management	Supervisors	Employees
Management Commitment and Employee Involvement	<ul style="list-style-type: none"> • How to build a safety culture • Safety and health strategic planning • Effective listening skills • Participative management skills 	<ul style="list-style-type: none"> • Managing safety and health performance • Techniques for getting employee involvement • Listening skills • Participative management skills 	<ul style="list-style-type: none"> • How to report safety and health concerns • How to identify ideas for safety and health improvement • Effective communication skills
Worksite Analysis	<ul style="list-style-type: none"> • Preparing a baseline survey for safety and health. • Injury and illness trend analysis 	<ul style="list-style-type: none"> • Customizing a worksite analysis to your department • Teaching employees to perform a self-inspection 	<ul style="list-style-type: none"> • How to identify hazards on your job • Performing a self-inspection
Hazard Prevention and Control	<ul style="list-style-type: none"> • Safety and Health Return-on-Investment • Designing safety into the organization 	<ul style="list-style-type: none"> • Motivation techniques for safety • Teaching employees about controls 	<ul style="list-style-type: none"> • Facts about the medical program • How to identify controls for your job
Safety and Health Training	<ul style="list-style-type: none"> • Safety and health training strategies • Developing safety-minded managers • Emergency procedures 	<ul style="list-style-type: none"> • Techniques for coaching employees • How to conduct on-the-job training • Emergency procedures 	<ul style="list-style-type: none"> • Team skills for safety • Teaching your co-worker to be safe • Emergency procedures
Sustainability	<ul style="list-style-type: none"> • Building an organization with a triple bottom line 	<ul style="list-style-type: none"> • Managing sustainably 	<ul style="list-style-type: none"> • Preventing waste on the job

Methods of Training

Directions: There are many different ways to deliver safety and health training to an organization. The method you choose will depend on the objectives you want to accomplish and the number of people you need to train. As you are introduced to each of the following types of training, consider when you might be able to use each in your organization.

Classroom Training

What it is:	Formal instruction that takes place away from the job in a classroom with an instructor or facilitator guiding the learning
Who teaches it:	<ul style="list-style-type: none">• An expert on the subject being taught• Can be a safety person, a supervisor, or even a representative from a vendor
When you might use it:	<ul style="list-style-type: none">• When you have a large group of people to train• When you want everyone who is being trained to get exactly the same information
How to use in your organization:	

On-The-Job Training

What it is:	Training that occurs <i>at a person's job</i> . The employee actually learns the job by doing it.
Who teaches it:	<ul style="list-style-type: none">• Someone who knows the job well• A trainer, supervisor, or lead worker• The trainer follows written procedures or training guidelines
When you might use it:	<ul style="list-style-type: none">• When learning a job requires the use of equipment• When learning the job requires a series of steps and it is better to perform them on the job
How to use in your organization:	

Methods of Training—continued

One-on-One Coaching

What it is:	Training that occurs when one person takes the responsibility of teaching or training another person
Who teaches it:	<ul style="list-style-type: none">• A supervisor, a peer, an outside expert
When you might use it:	<ul style="list-style-type: none">• When a person needs help with soft skills, such as communication or interpersonal relations• When a person is learning an analytical skill, such as hazard recognition
How to use in your organization:	

Tailgate Sessions

What it is:	Training and communication that occurs at the beginning of each shift or during implementation of large projects such as construction projects
Who teaches it:	<ul style="list-style-type: none">• The project manager or lead• The department supervisor
When you might use it:	<ul style="list-style-type: none">• During large projects as a means to communicate updates to employees• Allows employees to communicate their concerns and questions to the project leader
How to use in your organization:	

Methods of Training—continued

Meetings

What it is:	Informal training and communication that occurs in small groups, usually away from the worksite
Who teaches it:	<ul style="list-style-type: none">• Department supervisor• Subject matter expert
When you might use it:	<ul style="list-style-type: none">• When there is new information to communicate or learn• When a policy or process changes
How to use in your organization:	

Individual Learning

What it is:	Informal training that individuals undertake on their own
Who teaches it:	<ul style="list-style-type: none">• Individuals are self-directed• They could be learning from a book, a workbook, an interactive computer program, or a web-based learning network
When you might use it:	<ul style="list-style-type: none">• When no other formal training is readily available• When a person is a disciplined self-starter
How to use in your organization:	

Process for On-the-Job Training

When you provide on-the-job training, it is important to be organized and thorough. Following is a process anyone can use when providing on-the-job training.

1. Start with the big picture. Explain why the job or process is important. Explain why it is important to do the job or process in a safe manner.
2. Explain the job or process step by step. For each step you discuss, emphasize the important safety requirements.
3. Demonstrate the job or process step by step.
4. Encourage questions and comments from the trainee.
5. Have trainee perform the job or process step by step while you watch.
6. Observe and offer feedback. Emphasize the safety requirements by acknowledging and praising those that were followed and by correcting those that were not.
7. When you are comfortable with the trainee's proficiency level, allow him/her to work alone. Make yourself easy to find in case the employee has questions or problems.
8. Give trainee a set of written procedures to follow once s/he is on his/her own.



Note: The above process is available on your *Tools and Resources* CD. Print it and use it to guide you when you do on-the-job training.

Tips for Writing Procedures

Whether you are doing on-the-job training, documenting how a job should be done, or performing a job hazard analysis, it is important to have written procedures for every job. Here are some suggestions that will help you write good procedures.

1. Write the objective and/or expected outcome of the task/process.
2. Perform the task/process step-by-step.
3. As you go through each step, write down the following:
 - What you have to do to accomplish the step.
 - Any tips or suggestions for making the step easier.
 - Any potential hazards associated with the step.
 - The required safety measures.
4. Once the procedures are written, give them to someone who is familiar with the task/process and ask them to perform the task using your procedures.
5. Get their suggestions for improvement.
6. Revise the procedures based on the feedback.
7. Neatly type the procedures before giving them to trainees for use.



Steps	Hazard(s)	Control(s)
1. Turn on the power.	Electrical shock	Wear safety glasses.
2. Check the voltage.	Electrical shock	Wear safety glasses.
3. Connect the wires.	Electrical shock	Wear safety glasses.
4. Test the circuit.	Electrical shock	Wear safety glasses.
5. Turn off the power.	Electrical shock	Wear safety glasses.
6. Disconnect the wires.	Electrical shock	Wear safety glasses.
7. Turn on the power.	Electrical shock	Wear safety glasses.
8. Check the voltage.	Electrical shock	Wear safety glasses.
9. Connect the wires.	Electrical shock	Wear safety glasses.
10. Test the circuit.	Electrical shock	Wear safety glasses.
11. Turn off the power.	Electrical shock	Wear safety glasses.
12. Disconnect the wires.	Electrical shock	Wear safety glasses.
13. Turn on the power.	Electrical shock	Wear safety glasses.
14. Check the voltage.	Electrical shock	Wear safety glasses.
15. Connect the wires.	Electrical shock	Wear safety glasses.
16. Test the circuit.	Electrical shock	Wear safety glasses.
17. Turn off the power.	Electrical shock	Wear safety glasses.
18. Disconnect the wires.	Electrical shock	Wear safety glasses.
19. Turn on the power.	Electrical shock	Wear safety glasses.
20. Check the voltage.	Electrical shock	Wear safety glasses.

Note: The above tips are available on your *Tools and Resources* CD. Print them and use them to guide you when you write procedures.

Sample On-The-Job Training Procedure

Let's look at a sample on-the-job training procedure that documents a familiar process.

Task: Making a Peanut Butter and Jelly Sandwich

Objective: Make a peanut butter and jelly sandwich.

Materials Required: Work surface, plate, knife, two slices bread, jar of peanut butter, jar of jelly

Procedures:

Step	Potential Hazard(s)	Controls
1. Wash hands before you begin.	<ul style="list-style-type: none"> Burns from hot water 	<ul style="list-style-type: none"> Check water temperature prior to using.
2. Assemble materials on a work surface.	<ul style="list-style-type: none"> Material could fall off and become contaminated 	<ul style="list-style-type: none"> Make sure surface is flat.
3. Place one piece of bread on a plate.	<ul style="list-style-type: none"> Repetitive motion 	<ul style="list-style-type: none"> Vary the task.
4. Open jar of peanut butter.	<ul style="list-style-type: none"> Strain from tight lid If container is glass, it could break 	<ul style="list-style-type: none"> Use warm water on the lid if it is difficult to open. If jar is glass, open over a soft surface.
5. Use knife to scoop peanut butter from jar and spread on bread.	<ul style="list-style-type: none"> Cuts from knife 	<ul style="list-style-type: none"> Use non-serrated butter knife.
6. Open jar of jelly.	<ul style="list-style-type: none"> Strain from tight lid If container is glass, it could break 	<ul style="list-style-type: none"> Use warm water on the lid if it is difficult to open. If jar is glass, open over a soft surface.
7. Use knife to scoop jelly out of jar and spread it over peanut butter.	<ul style="list-style-type: none"> Cuts from knife 	<ul style="list-style-type: none"> Use non-serrated butter knife.
8. Place the second piece of bread over the jelly.	<ul style="list-style-type: none"> Repetitive motion 	<ul style="list-style-type: none"> Vary the task.
9. Using knife, cut sandwich in half.	<ul style="list-style-type: none"> Cuts from knife 	<ul style="list-style-type: none"> Use non-serrated butter knife.
10. Serve to hungry people.	<ul style="list-style-type: none"> Potential peanut allergies 	<ul style="list-style-type: none"> Check for peanut allergies.

Using the Tailgate Meeting to Train Employees

Even though the main purpose of the tailgate meeting is to discuss the day's work and allow employees to share any safety problems or concerns, it can also be a great opportunity to teach employees about your organization's safety and health program. Following are some suggestions for creating discussion about safety and health during the tailgate meeting.

1. Determine ahead of time which points you want the discussion to emphasize.
2. Use a discussion starter—something you say or do that motivates people to talk. It can be a question you ask or a statement you make. (Example: How have those self-inspections been going for you?)
3. Provide some warm-up time.
 - Allow some quiet time for individuals to think about their ideas first.
 - Allow some time for small team discussion (3-4 people) before talking with the full group.
4. Keep everyone involved.
5. Challenge participants to think.
6. Keep a steady pace.
7. Repeat employees' ideas to emphasize the most important points.
8. Clarify and interpret what employees have said.
9. Keep the discussion focused by relating comments back to the main topic.
10. Build on previous comments.
11. Relate the discussion to the real world. Ask for and provide examples of how the discussion applies to their jobs.
12. Periodically summarize the key points.
13. Minimize your participation so the discussion won't become a lecture.
14. Summarize everything in writing, with emphasis on key decisions that were made.
15. Distribute the notes to employees as soon as possible.



Note: The above guidelines are available on your *Tools and Resources* CD. Print them and use them to guide you when you conduct a tailgate session.

Every Day Training with One-On-One Coaching

Training doesn't have to be formal. In fact, safety and health training is most effective when it's done on an ongoing basis and is integrated into day-to-day operations. Leaders can turn these typical work situations into learning by using one-on-one coaching.

Directions: Following is a list of normal work activities. In your group, identify ways a leader can use that activity to inspire safety and health learning. The first answer is provided as an example.

Activity	How to Integrate Safety and Health
1. Providing orientation to a new employee	Make safety and health an orientation topic.
2. Scheduling work	
3. Making work assignments	
4. Instruction on how to operate a machine	
5. Performing lockout/tagout	
6. Helping an employee solve a problem	
7. Rewarding employees	

Training on a Budget

Training for employees doesn't have to be costly. If you use some creativity, you will find there are many free or inexpensive learning options available to your organization. Following are just a few.

- Be a strong mentor and coach. The best job development comes from experience. Be there to help your employees learn from their experiences.
- Establish round table discussions. Choose an issue of importance to a number of employees, then set aside some time to discuss that issue.
- Take advantage of "free preview" offers from training film companies. When the films arrive, announce when and where they will be showing (be sure to get permission from the company to show the preview to a group). Offer to serve popcorn
- Subscribe to safety and health publications and place them in lunch and break rooms.
- Create a safety challenge. Select a relevant article from a safety and health publication and offer a prize for the person/team that can find the best/most creative application of the article at your organization.
- Determine if any of your local professional organizations have speaker's bureaus. Often they do and these speakers are willing to come speak on specific topics for free.
- Take advantage of the inexpensive "in your town" workshops. They usually cost under \$100 and offer a variety of safety and health topics. Send a couple of employees and then ask them to share what they've learned in a tailgate session.
- Bring in students/professors from the local college or university. Have them share information about the research they are doing.
- Establish safety "hot topics" lists throughout your building. Encourage employees to write on the lists items for discussion in future tailgate meetings.
- Invite an OSHA representative to present a safety and health topic.
- Invite your insurance agent to present a safety and health topic.
- Go to your local police or fire station for their expertise/training.
- Invite your equipment vendors to give demonstrations on how to operate the equipment in a safe manner.

Note: The above checklist can be helpful when you want to get training ideas for your organization. The list can be found on your *Tools and Resources* CD.

Characteristics of Effective Training

How will you know if the training you offer is effective? Look for some of these characteristics. The more you have, the more you can consider your training efforts to be successful.

- Safety and health are a part of your organization's culture. Training is required by, budgeted for, and reinforced by top management.
- The topics you teach are relevant to your organization and to the jobs of individual employees.
- You identify learning outcomes and then design the training around those outcomes.
- Each training session has clearly stated, measurable objectives. Objectives should be:
 - Specific.
 - Measurable.
 - Attainable.
 - Relevant to the job.
 - Time-oriented.
- The training is hands on and gives participants a chance to practice with relevant equipment, ask questions, and share ideas about what they are learning.
- The training is reinforced back on the job. Supervisors need to check with employees to ensure they are practicing what they've learned and coach them for further understanding.
- There is evidence that the training is effective, that comprehension and behavioral change have occurred. This can come in the form of observation, testing, or talking with employees. The best results are when your organization sees an improved safety and health record.
- There is repetition and reinforcement of the learning concepts. Employees may not understand everything the first time they hear it, so it's important to continually communicate your safety message in as many different ways as possible.

Note: The above checklist can be helpful when you want to evaluate your organization's training efforts. It can be found on your *Tools and Resources* CD.

The Importance of Repetition

Directions: In the space below, write as many objects as you can remember from viewing the slide on the screen.



What important points does this activity tell you about training for safety and health?

When Training is Not the Answer

Once an organization recognizes the value of training, there is no limit to how far it can go in developing its employees. At the same time, it is important to realize that training is not the answer to every problem.

<p style="text-align: center;">Skills and Knowledge</p> <p>Examples:</p> <ul style="list-style-type: none"> → Lockout/tagout procedures → Effective safety leadership → Effective listening skills → Emergency procedures → Safety and health inspections → Effective communication skills → Process for reporting safety problems to management 	<p style="text-align: center;">_____</p> <p>Examples:</p>
<p style="text-align: center;">_____</p> <p>Examples:</p>	<p style="text-align: center;">_____</p> <p>Examples:</p>

Activity: Case Study

Directions: In Modules 3 and 4, you worked on a case study involving an incident with a palletizer. In Module 3, you identified the hazards that may have led to the incident. In Module 4, you determined possible controls and brainstormed some ways to engineer safety into a new palletizer. Assume that all of your recommended controls have been adopted. Also assume that the new palletizer has been installed. Your job now is to determine what training should be implemented so that the controls will be used consistently and correctly. For each control, identify the training topic and the type of training, who should receive the training, and who will provide the training. An example is provided to get you started.

Control	Training Topic/Type of Training	Who Receives the Training	Who Gives the Training
New palletizer with engineering controls built into the design	Topic: Correctly using the palletizer Type: Classroom or on-the-job	Anyone who will be using or servicing the palletizer	The vendor
	Topic: Type:		

