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# MODULE 5

## SAFETY AND HEALTH TRAINING

### Objectives

At the end of this module, participants 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 they 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.

### Time

65 minutes: 2:05 to 3:10 PM

Followed by a 10 minute break: 3:10-3:20 PM

## Agenda

1. Introduction to Safety and Health Training and OSHA's Guidelines—Presentation (5 minutes)
2. The Function and Scope of Safety and Health Training—Discussion (10 minutes)
3. Methods of Training—Presentation and Discussion (10 minutes)
4. On-The-Job Training—Presentation and Discussion (5 minutes)
5. Tailgate Meetings and One-on-One Coaching—Discussion and Activity (10 minutes)
6. Characteristics of Effective Training—Presentation and Activity (10 minutes)
7. When Training is Not the Answer—Discussion (5 minutes)
8. Identifying Employee Training—Case Study (10 minutes)

## RECOMMENDED PROCESS

### 1. Introduction to Safety and Health Training and OSHA's Guidelines— Presentation (5 minutes)

Cues	Content
PPT 5-1	<ul style="list-style-type: none"> <li>■ You will cover Pages 1 and 2 in this segment. Allocate about the same amount of time to each page.</li> <li>■ Show PPT 5-1 as you refer participants to Page 1 in Module 5 of their Participant Guides.</li> <li>■ Introduce the module by saying they'll now be examining the last of the four OSHA processes: safety and health training.</li> </ul>
PPT 5-2 and PPT 5-3	<ul style="list-style-type: none"> <li>■ Show PPT 5-2 and PPT 5-3 as you introduce the objectives to this module.</li> </ul>
Facilitator Note	<ul style="list-style-type: none"> <li>■ It is essential that you do the activity on Page 2 because it will be used again in Module 6.</li> <li>■ Refer participants to Page 2. Make the following points.               <ul style="list-style-type: none"> <li>– OSHA's Safety and Health Program Management Guidelines identify a number of factors that indicate effective safety and health training.</li> <li>– These factors are listed on this page.</li> </ul> </li> </ul>
PPT 5-4	<ul style="list-style-type: none"> <li>■ Show PPT 5-4. Instruct participants to read Page 2 and check items that they feel their organization does well.</li> <li>■ Allow participants a couple minutes to read and check the list, then ask one or two people to share what they think their organization does well.</li> <li>■ Tell participants you will cover many of these points throughout Module 5.</li> </ul>

## 2. The Function and Scope of Safety and Health Training—Discussion (10 minutes)

Cues	Content
PPT 5-5	<ul style="list-style-type: none"> <li>■ You will cover Pages 3 and 4 in this segment. Allow approximately the same amount of time for each page.</li> <li>■ Refer participants to Page 3. Show PPT 5-5 as you make the following points.               <ul style="list-style-type: none"> <li>– The goal of safety and health training is to provide employees with the knowledge and skills necessary so that they can perform their work without injuring themselves or others.</li> <li>– All managers and employees must receive education and training in order to understand the requirements of effective safety and health protection.</li> <li>– Naturally, the training goals at each level of management will be different.</li> </ul> </li> </ul>
PPT 5-6	<ul style="list-style-type: none"> <li>■ Show PPT 5-6 as you review the goals for top management.</li> </ul>
PPT 5-7	<ul style="list-style-type: none"> <li>■ Show PPT 5-7 as you review the goals for supervisors.</li> </ul>
PPT 5-8	<ul style="list-style-type: none"> <li>■ Show PPT 5-8 as you review the goals for employees.</li> </ul>
Question:	<ul style="list-style-type: none"> <li>■ Ask participants: Are there any other goals you can think of for any of these groups?</li> <li>■ Get a few responses, then point out that goals will vary by organization.</li> <li>■ Refer participants to Page 4 and make the following points.               <ul style="list-style-type: none"> <li>– There are numerous training topics that can provide the knowledge and skills required to accomplish the goals on the previous page.</li> <li>– The chart on this page 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 OSHA’s key safety and health categories.</li> </ul> </li> </ul>

Question:

- Review the chart layout with participants by pointing out some of the training topics for each of the OSHA categories.
- Ask participants: Are there any topics that you would add?
- Get some responses. Point out that there are numerous training topics that can be offered at all levels. One of their jobs in building a safety and health program will be to determine which training programs are the right ones for their organization.

### 3. Methods of Training—Presentation and Discussion (10 minutes)

#### Cues

#### Content

- You will cover Pages 5 through 7 for this segment. Allocate about the same amount of time to each page.
- Refer participants to Page 5. Make the following points.
  - 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.
  - I’m going to introduce you to six different types of training that are effective in small businesses.
  - As I introduce each type, think about when you might use it in your organization.
- PPT 5-9
  - Show PPT 5-9 as you introduce classroom training.
  - Describe people who would normally teach classroom training.
  - Describe the situations in which classroom training is often used.
- Question:
  - Ask participants: What are some situations in which you might use classroom training at your organization?
  - Get some responses, then share any of the following that seem appropriate.
    - For company training on how to report safety and health concerns
    - For company training to introduce the medical program
    - For management training classes for supervisors
- PPT 5-10
  - Show PPT 5-10 as you introduce on-the-job training.

Question:	<ul style="list-style-type: none"><li>■ Describe people who would normally teach on-the-job training.</li><li>■ Describe the situations in which on-the-job training is often used.</li><li>■ Ask participants: What are some situations in which you might use on-the-job training at your organization?</li><li>■ Get some responses, then share any of the following that seem appropriate.<ul style="list-style-type: none"><li>– When learning the job requires the use of equipment</li><li>– When learning the job requires a series of steps and it is better to perform them on the job</li><li>– When one person shows another how to use the safety features of a piece of equipment</li><li>– When a supervisor shows an employee how to perform a self inspection</li></ul></li></ul>
PPT 5-11	<ul style="list-style-type: none"><li>■ Refer participants to Page 6. Show PPT 5-11 as you introduce one-on-one coaching.</li><li>■ Describe people who would normally use one-on-one coaching.</li><li>■ Describe the situations in which one-on-one coaching is often used.</li></ul>
Question:	<ul style="list-style-type: none"><li>■ Ask participants: What are some situations in which you might use one-on-one coaching at your organization?</li><li>■ Get some responses, then share any of the following that seem appropriate.<ul style="list-style-type: none"><li>– When one supervisor coaches another to be a more participative manager</li><li>– When a top manager coaches a supervisor on motivation techniques</li></ul></li></ul>
PPT 5-12	<ul style="list-style-type: none"><li>■ Show PPT 5-12 as you introduce tailgate sessions.</li></ul>

Question:

- Describe people who would normally teach in a tailgate session.
- Describe the situations in which a tailgate session might be used.
- Ask participants: What are some situations in which you might use a tailgate session to train at your organization?
- Get some responses, then share any of the following that seem appropriate.
  - To facilitate a discussion of safety concerns for the day's projects
  - When a supervisor wants to get employee ideas for reducing waste on the current project

PPT 5-13

- Refer participants to Page 7. Show PPT 5-13 as you introduce meetings.
- Describe people who would normally teach using a meeting setting.
- Describe the situations in which meetings might be used for training.

Question:

- Ask participants: What are some situations in which you might use meetings to train at your organization?
- Get some responses, then share any of the following that seem appropriate.
  - When top management wants to review safety and health policy
  - When a supervisor wants to emphasize the importance of safety and health controls

PPT 5-14

- Show PPT 5-14 as you introduce individual learning.
- Describe people who would normally use individual learning.

## Question:

- Describe the situations in which individual learning might be used.
- Ask participants: What are some situations in which you might use individual learning at your organization?
- Get some responses, then share any of the following that seem appropriate.
  - A top manager might read a book that describes how to achieve the triple bottom line
  - A manager or supervisor might take an online class on employee involvement
  - An employee might read a user's manual to learn how to safely operate a piece of equipment
- Answer any questions participants have on methods of training.

#### 4. On-The-Job Training—Presentation and Discussion (5 minutes)

##### Cues

Question:

PPT 5-15 and  
PPT 5-16

Question:

##### Content

- You will cover Pages 8 through 10 in this segment. Spend about the same amount of time on each page.
- Ask participants: Of all the methods of training you have just learned about, which one(s) do you think a small business would use most?
- Get some responses, then make the following points.
  - A useful and cost effective way to train employees is through on-the-job training.
  - Other effective methods are the tailgate meeting and one-on-one coaching.
  - For this reason we're going to spend a little bit more time on each of these training methods.
- Refer participants to Page 8 and make the following points.
  - When you provide on-the-job training, it is important to be organized and thorough.
  - Let's look at a process anyone can use when providing on-the-job training.
- Show PPT 5-15 and PPT 5-16 as you review the process for on-the-job training.
- Ask participants: Why do you think there is so much redundancy in this process?
- Get a few responses, then emphasize the following points.
  - Repetition is the key to effective training.
  - Giving employees the big picture first can help them better understand the entire process.

- Also, when it comes to safety and health, you want to make certain an employee is doing the job correctly and the way to do that is to check and double check.
- Refer participants to Page 9 and make the following points.
  - 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.
  - You may recall that, in Module 2, we discussed that it is important to have procedures as a part of management commitment.
  - This page provides you with the tips for writing good procedures.
- Quickly review the tips on Page 9. Once you have reviewed the tips, tell participants that you are now going to look at a sample procedure using a process that is familiar to everyone: making a peanut butter and jelly sandwich.
- Refer participants to Page 10. Review the procedures for making the sandwich.
- Encourage participants to comment and ask questions.
- Close this segment by emphasizing that having job procedures is essential for effective on-the-job training.

## 5. Tailgate Meetings and One-On-One Coaching—Discussion and Activity (10 minutes)

### Cues

### Content

- You will cover Pages 11 through 13 in this segment. Spend most of the time on Page 12.
- Refer participants to Page 11 and make the following points.
  - Even though the main purpose of a 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.
  - The suggestions on this page tell you how to do this.
- Quickly review the points on Page 11 and address any participant questions.
- Refer participants to Page 12. Introduce this page with the following points.
  - One of the nice things about training is that it 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.
- Tell participants that they will be working in their groups. For each activity listed in the left column, they will identify ways a leader can use that activity to inspire safety and health learning.
- As an example, review the first item with the class.
- Show PPT 5-17 as participants work. Walk around the room to answer participant questions and to get a sense of the ideas participants have.

PPT 5-17

## Optional

- If you are running short on time, you can divide the class into three sections and have each section work on two items.
- When time is up, lead a debriefing in which participants share the ideas they had for integrating safety and health training into everyday activities.
- Following are some ideas you can expect to receive from participants.
  - **Item #2:** Scheduling work.
  - **Integrate:** Make time in the schedule for employees to do self inspections.
  - **Item #3:** Making work assignments.
  - **Integrate:** Assign safety and health duties as well as production duties.
  - **Item #4:** Instruction on how to operate a machine.
  - **Integrate:** Become a role model and implement all the necessary controls.
  - **Integrate:** Ask employees to tell you what safety and health precautions s/he uses on this machine.
  - **Item #5:** Performing lockout/tagout.
  - **Integrate:** Post lockout/tagout procedures by every piece of equipment and insist that employees follow these procedures.
  - **Integrate:** Consistently remind employees to use lockout/tagout.
  - **Integrate:** Require periodic lockout/tagout inspections to ensure employees are doing it correctly.
  - **Item #6:** Helping an employee solve a problem.
  - **Integrate:** Make safety and health one of the criteria for solving the problem.

- **Item #7:** Rewarding employees.
- **Integrate:** Reward safety and health performance equally to productivity.
- Close the discussion by answering any participant questions.
- Refer participants to Page 13. Point out that training for employees doesn't have to be costly.
- If they just use a little creativity, they will find there are many free or inexpensive training options.
- Give participants a short time to review this page, then have participants share which items they think they will use on the job.
- Get as many responses as time permits.
- Encourage participants to try some of these techniques as they integrate their safety and health training.

## 6. Characteristics of Effective Training—Presentation and Activity (10 minutes)

Cues	Content
Question:	<ul style="list-style-type: none"> <li>■ You will cover Pages 14 and 15 in this segment. Spend an equal amount of time on each page.</li> <li>■ Ask participants: Let’s say you go back to your organization and implement some safety and health training. How will you know if this training is effective?</li> <li>■ Get some responses, then refer participants to Page 14, which introduces the characteristics of effective training.</li> <li>■ Briefly review the items on this page, and emphasize that the more of these items their organization has, the more effective the training will be.</li> <li>■ After you review the last point, tell participants you have an activity to demonstrate the point. Introduce it as follows. <ul style="list-style-type: none"> <li>– This is a variation of a childhood game you probably played at birthday parties.</li> <li>– I’m going to show you a screen filled with objects.</li> <li>– Your job is to concentrate on the screen and remember as many of the objects as you can.</li> <li>– For now, please put down your pens and pencils and concentrate just on the screen.</li> </ul> </li> </ul>
PPT 5-18	<ul style="list-style-type: none"> <li>■ Show PPT 5-18 for one minute, then darken the screen.</li> <li>■ Refer participants to Page 15. Tell them to use the space on this page to write as many objects as they can remember.</li> <li>■ Allow one minute for people to write.</li> </ul>
Question:	<ul style="list-style-type: none"> <li>■ When time is up ask: How many items did you get? <ul style="list-style-type: none"> <li>– Get a few responses. Try to find the people who found the highest and lowest number of items.</li> </ul> </li> </ul>

- Question:
- Ask participants: How many listed the spider?
    - Get a show of hands. Most hands should go up.
- Question:
- Ask participants: How many listed the rocking horse?
    - Get a show of hands. Many hands will go up.
- Question:
- Ask participants: How many listed the toy jack?
    - Get a show of hands. Not many hands will go up.
- Question:
- Ask participants: Why did so many people see the spider and the rocking horse, but not the toy jack?
  - Get some responses, then emphasize that the spider and rocking horse had unique features that made them stand out.
    - The spider was large compared to the other objects, and the rocking horse had movement
    - In contrast, the toy jack was tiny and didn't move.
- Question:
- Ask: What does this have to do with training employees?
- PPT 5-19  
Animated
- Get some responses, then show PPT 5-19 to review how the activity can teach them something about training employees.
  - When you review the last bullet, advance the slide so the spider appears.
  - Close the discussion by emphasizing that every employee will learn safety and health in different ways. They need to be prepared to do the following.
    - Make the most important safety and health information stand out so it can't be ignored.
    - Repeat important information in many different ways so every employee will eventually retain the information.

## 7. When Training is Not the Answer—Discussion (5 minutes)

Cues	Content
PPT 5-20, Animated	<ul style="list-style-type: none"> <li>■ You will cover Page 16 in this segment. Introduce it with the following.               <ul style="list-style-type: none"> <li>– Once you’ve realized the value of safety and health training, there is no limit to how far it can go in developing your employees.</li> <li>– At the same time, it is important to realize that training is not the answer to every problem.</li> </ul> </li> <li>■ Refer participants to Page 16 and show PPT 5-20. Point out that training can be used any time you want to give employees additional skills or more knowledge.</li> <li>■ Review some of the examples of skills and knowledge training listed on Page 16, then say that you’ll now look at some instances when training will probably not be effective.</li> <li>■ Advance PPT 5-20 to show that problems within the environment are usually not solved with training.</li> <li>■ Point out that problems in the environment can be related to tools, equipment or machines, or they can be related to relationships.</li> </ul>
Question:	<ul style="list-style-type: none"> <li>■ Ask: What are some examples of environmental issues?</li> <li>■ Get some responses, then add the following as appropriate.               <ul style="list-style-type: none"> <li>– The equipment or facility itself is causing the problem, and management neglects to fix the problem.</li> <li>– Management makes profit and production, not safety, a priority.</li> <li>– Management talks a lot about safety and health, but doesn’t practice it.</li> </ul> </li> <li>■ Advance PPT 5-20 to illustrate that training is not the answer to environmental issues.</li> </ul>

Question:

- Advance PPT 5-20 as you point out that motivation is another issue that is not usually solved with training.
- Ask: What are some examples of motivational issues?
- Get some responses, then add the following as appropriate.
  - Employees don't want to wear PPE because it is too hot or clumsy.
  - Employees are stressed out from too much work.
  - Morale is bad and employees tend to resist management's orders.
- Advance PPT 5-20 to illustrate that training is not the answer to motivational issues.
- Advance PPT 5-20 as you point out that improper selection and assignment of employees is another issue that is not usually solved with training.

Question:

- Ask: What are some examples of improper selection and assignment?
- Get some responses, then add the following as appropriate.
  - Employees are hired for a job, but lack the knowledge to do the job. This can happen when an organization is in a rush to fill a position and doesn't do the proper vetting.
  - Employees have been trained to do a job, but can't seem to get the hang of it.
- Advance PPT 5-20 to illustrate that training is not the answer to poor selection and assignment.
- Close this segment by pointing out to participants that training is useful in many situations, but they should be sure to use it only when it's appropriate.

## 8. Identifying Employee Training—Case Study (10 minutes)

Cues	Content
	<ul style="list-style-type: none"><li>■ You will cover Page 17 in this segment.</li><li>■ Tell participants they will now continue the case study with the palletizer. Introduce it with the following.<ul style="list-style-type: none"><li>– Let’s look at what we’ve done so far with this case study.</li><li>– In Module 3, you identified the hazards that may have led to the incident.</li><li>– In Module 4, you determined some possible controls and brainstormed some ways to engineer safety into the new palletizer.</li></ul></li></ul>
Flipchart	<ul style="list-style-type: none"><li>■ Point to the flipchart page (or pages) you prepared and posted during the case study in Module 4. These are the pages that identified controls for the hazards they identified relating to the palletizer incident.<ul style="list-style-type: none"><li>– Now assume that all of your controls were implemented.</li><li>– Even the new palletizer has been installed.</li><li>– Your job now is to determine what training should be implemented so that the controls will be used consistently and correctly.</li><li>– For each control, identify the following:<ul style="list-style-type: none"><li>• The training topic and the type of training you will use.</li><li>• Who should receive the training.</li><li>• Who should give the training.</li></ul></li></ul></li><li>■ Review the example on Page 17 so participants can see what they should do.</li></ul>

PPT 5-21

- Using a large group activity, ask participants to name four other controls that were identified during the case study in Module 4. They can select these controls from the list on the flipchart.
- As participants name the controls, tell them to write each control in the left column on Page 17.
- Although participant responses will vary, here is a list of the possible controls they will name.
  - Create inspection procedures.
  - Make completion of inspection a part of every supervisor's performance appraisal.
  - Make it a serious violation of company policy to tamper with guarding.
  - Create and implement a lockout/tagout procedure.
  - Implement an inspection procedure for the new palletizer.
  - Mandate work/rest periods when employees are working overtime.
- Once the group has identified four controls, have them work in teams of three to four people to complete the remainder of Page 17.
- Show PPT 5-21 as participants work. Allow about 5 minutes.
- As participants work, walk around the room to answer their questions and to see what types of training they are identifying.
- When time is up, call the groups back together and have them share what they have identified.
- Following is a summary of their potential responses.
  - **Control:** Create inspection procedures.

- **Training topic:** Inspection Procedure Training
- **Type of training:** Classroom
- **Who should receive the training:** Everyone in the company. Top management needs to reinforce the procedure. Supervisors need to know what is required of their employees. Employees need to know how to use the procedures.
- **Who should teach the training:** To get employee involvement, consider having a manager and an employee team teach the course.
- **Control:** Make completion of inspection a part of every supervisor's performance appraisal.
  - **Training topic:** Safety Inspection Performance
  - **Type of training:** Meeting
  - **Who should receive the training:** All supervisors and managers
  - **Who should teach the training:** Top management to reinforce that this is a priority
- **Control:** Make it a serious violation of company policy to tamper with guarding.
  - **Training topic:** Guarding Policy
  - **Type of training:** Tailgate Meeting, one-on-one coaching
  - **Who should receive the training:** All employees
  - **Who should teach the training:** Supervisors should lead the tailgate sessions and should hold individual coaching sessions with each employee
- **Control:** Create and implement a lockout/tagout procedure.
  - **Training topic:** Lockout/Tagout

- **Type of training:** On-the-job training
- **Who should receive the training:** All supervisors and employees
- **Who should teach the training:** The people (both supervisors and employees) who devised the procedure
- **Control:** Implement an inspection procedure for the new palletizer.
  - **Training topic:** Palletizer inspection
  - **Type of training:** On-the-job
  - **Who should receive the training:** Anyone using the palletizer, all supervisors of palletizer employees
  - **Who should teach the training:** The vendor, supervisors and employees who devised the inspection procedure
- **Control:** Mandate work/rest periods when employees are working overtime.
  - **Training topic:** Work/Rest Periods
  - **Type of training:** Meeting
  - **Who should receive the training:** Supervisors and employees
  - **Who should teach the training:** Top management to show their commitment to the procedure
- Close this case study by addressing any remaining questions.

10 Minute Break

Take a 10 minute break.