10 Steps for Evaluating Your OSHA Training Needs

An informational guide
to help you understand
the health and safety training options
that best fit your company

"Compliance training sets the standards for educating employees about the safe and proper use of hazardous equipment and materials, as well as the practice of safe work habits."

introduction

Not all workplace mishaps are caused by human error; in your company or industry, they may actually be rare. But finding the right training can significantly reduce the number of accidents that result from employees who act through negligence or inexperience. Compliance training sets the standards for educating employees about the safe and proper use of hazardous equipment and materials, as well as the practice of safe work habits. Ensuring safety and preventing accidents are worthwhile goals for any company, but it's also the law. Training is a basic requirement for industries to comply with federal (and often, state) safety regulations.
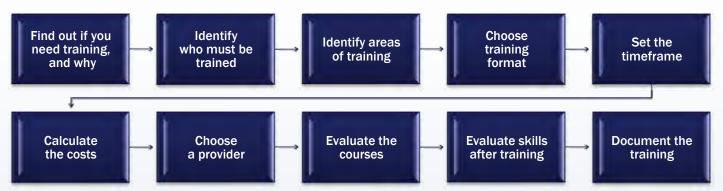
Chances are that you need to outsource your training for any number of reasons: For example, you operate a small business, you need to comply with certain regulations immediately, or you don't have the internal resources to train your employees on an ongoing basis. Before you choose a health and safety training provider, please study this guide. It will help you make intelligent decisions about which provider and instructional format is right for you.

ten steps for effective training

Before you can begin training your employees, you should answer the following 10 questions in order. They are the 10 steps of effective training:

1. Do we need training, and why?
2. Who must be trained?
3. In what areas should they be trained?
4. Which training format should we use?
5. What's our timeframe for completing training?
6. How much will training cost?
7. Which provider should we choose?
8. How should courses be evaluated before training?
9. How should skills be evaluated after training?
10. How should we document training?

The ten steps for effective training

| Find out if you need training, and why | → | Identify who must be trained | → | Identify areas of training | → | Choose training format | → | Set the timeframe |

| Calculate the costs | → | Choose a provider | → | Evaluate the courses | → | Evaluate skills after training | → | Document the training |

step 1: do we need training, and why?

Maintaining a safe, healthy workplace is everyone's responsibility. A company must provide a working environment that's relatively free of unnecessary risks, and employees must follow safe policies and practices at all times. However, the ultimate responsibility lies with the company, which supplies the resources to improve safety. Offering your employees health and safety training that's appropriate for their job function is a major step in ensuring a workplace with significantly fewer accidents, illnesses and injuries.

If you believe that "How much can we afford to spend?" is the only question you need to ask, you're ignoring one that's more important: "Do we need training, and why?" Its answer is central to all training decisions you will make, since it describes your goals and helps you focus on them during the search for the right training provider. Analyzing your budget then calculating how many employees can be trained is a common practice, but it can prevent you from seeing the big picture: the critical role that training plays in the safety of your employees and the operation of your business.

Instead, your first step should be to determine whether training is required, is recommended for health and safety, or serves as a preventive measure in case of an accident. If you're unsure, take the quiz

"Evaluate Your Need for Health and Safety Training" on the next page. When you've finished it, think about why training is necessary for you. Perhaps your company has lately experienced more accidents and injuries than usual, or a safety inspection has mandated training for certain employees. Maybe you've recently introduced new types of hazardous materials, equipment, processes or procedures, and employees must be trained to comply with different safety regulations.

Safety training is an invaluable investment in your employees and business. Regardless of what's driving your need for training, you should recognize the value of training and take control of the process of choosing a training provider. (See "Worksheet: Reasons for Training" on the next page.) Employees trained in the proper use of equipment and materials feel better about their jobs and more confident about their abilities, feel safer and more secure, take fewer days off due to workplace-related illness or injury, and remain safe and productive employees longer. And by helping trained employees share their knowledge with others, health and safety training continues to return this investment over time.

EVALUATE YOUR NEED FOR TRAINING

Answer the following questions to determine whether your employees need health and safety training now or in the near future:

A. Required by Law
    1. Were you cited by OSHA during a recent inspection as requiring employee training and skills improvement?
    2. Is health and safety training required for all employees who begin new tasks at your company?
    3. Is compliance training required for new-hires before they start work?
    4. Does federal or state law require some employees to take annual or other ongoing training?
B. Preventive Measures
    1. Have you recently introduced new equipment or hazardous materials?
    2. Have you witnessed an increase in Workers Compensation insurance rates?
    3. Have you experienced an increase in work-related accidents and injuries at your company?
C. Recommended for Health and Safety
    1. Do too many new employees display poor safety behaviors?
    2. Do you have part-time, temporary workers or contractors who could benefit from a health and safety course?
    3. Do some employees routinely avoid handling hazardous materials for fear of injury?
    4. Is health and safety training included in employee annual performance goals?

If you've answered at least one question with a "Yes," it's time to schedule training. Refer to the steps in this informational guide to help you define your needs, search for and evaluate a training provider, and make a decision on which one to train your employees.

WORKSHEET: REASONS FOR TRAINING

Using the spaces below, take a few moments to jot down some reasons you might have for scheduling health and safety training for your employees.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Some of your reasons might include reaching compliance mandates, increasing the number of trained employees, changing employee behavior, instilling a general awareness of safety at the company, or remaining competitive.

step 2: who must be trained?

Once you've determined that you need to pursue training and why, consider who will be trained. Based on job description and regulations, you should already know the level of skill that these employees must perform. In your analysis of employees who need training, be sure to include certain temporary and part-time workers as well as long-term contractors, especially if they operate your machinery, handle hazardous materials or supervise these activities.

Many companies apply shortcuts, thinking they'll be saving money by training fewer employees. For example, they'll randomly choose employees who would benefit most from training, or they select a few employees who are later assigned to train others. Sometimes they'll wait until an OSHA auditor tells them which job titles needs training.

Instead of pursuing this flawed and dangerous approach, conduct an internal "mock audit" in which supervisors (or consultants) observe and rate employees' skills as they perform on the job. Auditors should note whether job performance is satisfactory or unsatisfactory, identifying skills to be improved and inappropriate behavior to be corrected. Following the audit, keep records as to which employees need improvement and in what areas, as well as which employees need to take a refresher course to reinforce previous training.

step 3: in what areas should they be trained?

Next, find out what courses will bring them to their required level of safety in the shortest amount of time. Based on the results of the audit, identify the subject matter areas that each employee needs. Health and safety training providers offer dozens of different courses. Do your best to isolate what content each employee should learn, then select the proper courses based on their description and objectives. You may be able to meet all your compliance needs using standard classroom training or off-the-shelf courses with no customization. In other words, your training will be the same as other employees in other companies receive.

However, in some cases, content customization will be necessary. This includes adding content not usually covered in the standard course, requesting that more time and resources be spent in enhancing certain topics, or scheduling a lab focused on demonstrating and testing safe use of equipment or materials.

Customization can improve skills and increase specialized knowledge. However, any degree of customization is possible when face-to-face classroom or virtual classroom training is a component of the program—unless you have the means to outsource the design of a self-paced program that perfectly matches your company's needs.

step 4: which training format should we use?

Training comes in different formats, and each has distinct pros and cons. These include classroom training, self-paced learning, virtual classroom, webinar, and a hybrid of one or more of these (also called "blended learning"). The right format at any particular time can depend on the number of employees to train, logistical and time factors and the need for skills training, as well as how much

EXPAND THE SCOPE

Don't limit training to front-line employees who work at certain locations, use dangerous equipment or handle hazardous substances. Other employees— supervisors, office staff and even *you*—can benefit from health and safety courses, such as OSHA Outreach Training. Certain courses can appear on a list you provide to each employee; successfully completing a course can be tied to incentives or positive annual performance reviews.

Safety training can help all employees remain aware of their surroundings, recognizing and looking out for safety risks and dangers before problems occur. Consider making some form of health and safety training a requirement for new-hires, apprentices and trainees, supervisors, managers and any others who would improve the overall level of safety in your company.

DESCRIBING TRAINING FORMATS

Even though your first instinct may be to schedule a live instructor, health and safety training doesn't always have to be in a classroom. Nowadays, businesses have a wide variety of options of training formats from which to choose. Whichever option you select, the course content must adequately cover all regulations that pertain to your industry, company and employees. Some customization may be necessary, but not all formats offer that option (see "Comparison Chart: Training Formats" on page 9). However, all formats must include a test at the end, as well as short quizzes and interactive exercises throughout.

Here are the main formats:

1. *Classroom training*, either at your training site, the provider's conference room or a local training center, is the traditional option. It is especially designed for all-day or multiple-day courses. Classroom instructors can train more employees in a shorter period of time. The best instructors promote participation, increase understanding of content, and ensure that the right training reaches everyone at the same time. Classroom training also offers other benefits, especially the ability to demonstrate and evaluate safe skills.

However, of all the formats, classroom training is logistically the most complicated and the least flexible to schedule. After all, it can be a staggering effort—and not a

great idea for productivity—to arrange for all employees, especially those who work at remote sites, to meet at the same place and time during normal business hours. Multiple sessions often must be held to accommodate different schedules and shifts. (For some courses, OSHA sets limits of between no fewer than three and no more than 40 employees in one class.)

But the most important factor of this format is the trainer's background. All OSHA Authorized trainers must have at least five years of industry experience, pass the required policy and trainer courses, and complete continuing education courses every four years for recertification.

If you don't have an OSHA Authorized trainer at your facility, you can find providers using local resources or on the web. Before choosing a classroom trainer, ask for a resume or background, course content list (syllabus), learning objectives and any reference material that employees can take with them after class for further study. Be sure to determine beforehand whether these materials are complete in content and professional in appearance.

2. *Self-paced instruction* is an effective, affordable alternative that trumps classroom training in terms of convenience. The per-employee cost of self-paced courses

customization is necessary. For a discussion of each format, see "Describing Training Formats" beginning atop this page.

If customization is not necessary for your employees' training, standard classroom instruction, off-the-shelf online courses or a blend of these formats will supply everything you need. But one type of format probably won't fit all your employees. To the contrary, you may find that some employees have different needs based on their work location, experience or learning styles.

For example, employees at remote sites may not be able to attend classroom training with everyone else, so you'll need to provide self-paced or online options for them. Other employees might only require an online refresher course as a result of having taken previous compliance training. Finally, some employees learn best in a classroom, while

others will learn effectively with online interactive courses supplemented by a hands-on lab. In short, don't expect that a single format will work for all employees; consider using more than one format at the same time.

step 5: what's our timeframe for completing training?

Finding the time to schedule and complete health and safety training should be a major concern. Delaying it might lead to accidents that result in injury and illness. On the other hand, training large groups of employees all at once has the disadvantage of shutting down entire departments, causing you to lose money due to downtime.

is much less than classroom training. Also, employees can receive the same credentials as they would in a classroom after completing the course—a certificate of completion and a wallet card.

Nearly all self-paced courses are online. However, paper-based or CD-based correspondence courses are also available; these may include video, exercises, case studies and other materials. Instead of everyone meeting in one classroom session, each employee can schedule a self-paced course at his or her convenience. Self-paced courses can also be more convenient for your company, since you don't have to set aside work time to train multiple employees. Training can take place at any time, as long as the employee has access to the learning materials; in most cases, this means a computer with broadband access.

Employees can begin training with self-paced online courses (also called "e-learning") immediately after enrolling and logging in with a secure username and password. They can also start and stop their instruction whenever necessary. The course "times out" after 15 minutes or so of inactivity but can be resumed after the employee logs in again.

But self-paced doesn't always mean faster paced, since it might take longer for some employees to grasp a concept when an instructor isn't around to ensure understanding. Also, OSHA requires that longer courses (those with more than 7.5 hours of instruction) be divided into multiple days. Employees must complete a course within six months with a passing score of the final test (usually 70%), or they must re-enroll and pay another fee. If they fail a test after three attempts, they may be restricted from taking the same course online and must find a different format (such as classroom instruction).

Self-paced courses often require additional motivation to learn. Although most online providers include phone or live chat with an instructor, this may not be sufficient to promote comprehension and skills development for everyone. So, supervisors in your company should assist and mentor employees who take self-paced courses. These mentors should answer any questions about the material and provide that extra incentive for the employee to complete the course within the allotted time. When investigating self-paced options, be sure that supervisors also have online access to the provider's learning management system (LMS) to regularly track employee progress, courses completed and test scores.

3. Gaining in popularity is the *virtual classroom*. This offers many of the benefits of a face-to-face classroom but at a lower cost. Instead of convening at a physical location, employees meet at a secure online "meeting area." ▶

One recommended approach is to prioritize training, scheduling those employees whose training needs are critical before those whose needs aren't as critical. You may incur additional expense by scheduling too many classes or requesting customization on a quick turnaround.

Everyone working in a company where hazardous materials or conditions exist should receive the appropriate type and amount of safety training. However, those employees who come in direct contact with such materials or conditions, as well as those who supervise them, should be trained before others. Also, safety training on new machinery or materials should be completed before they're installed.

So, categorize employees by level of risk. Those who operate at the greatest risk by nature of their positions (or have been cited by OSHA) should be given highest priority. These positions have the highest incidence of work-related accidents and injuries within the company and the industry.

Set progressively lower priorities for training with those employees who are further from the hazards but still need to be aware of how to remain safe.

After you've identified your priority levels, construct a timeline for each population and begin scheduling the training. Make sure the timeline includes registration, course completion, refresher courses and other milestones.

step 6: how much will training cost?

Did you notice that this is step 6, not step 1? That's because the information you learned in the previous steps can add to the overall cost. After deciding which courses

Comparison Chart: Training Formats

Features		Training Formats					
		Classroom instruction	**Self-paced online (e-learning)**	**Self-paced materials**	**Virtual classroom instruction**	**Webinar**	**Hybrid (blended classroom and online)**
	Cost per employee	Low to high, depending on classroom hours and number of employees	Low	Low	Low to high, depending on classroom hours and number of employees	Low	Low to high, depending on hours and number of employees
	Ability to train skills	High	Low	None	Low	Low	High
	Ability to customize	High	None	None	High	Low to medium, depending on whether public or private webinar	High
	Travel required	Potential, either for the trainer or employees	None	None	None	None	Potential, either for the trainer or employees
	Convenience	Low	High	High	Medium	Medium	Low
	Certificate documents after testing	Yes	Yes	Yes	Yes	Yes	Yes
	Interactivity	High	Low to medium, depending on number of exercises and quizzes	Low	Low to high, depending on number of exercises, quizzes, Q&A, etc.	Low to medium, depending on Q&A	High
	Special requirements	Physical presence of trainer and employees at a single location	Access to computer and broadband service	Supervisor mentoring and assistance	Access to computer and broadband service	Access to computer and broadband service	Access to computer and broadband service

DESCRIBING TRAINING FORMATS *(continued)*

As with the traditional classroom format, virtual instruction is led by an OSHA Authorized trainer. Employees can participate over the virtual connection from anywhere in the world but must have access to a computer hooked up to a consistently robust broadband service throughout the class.

The virtual classroom format often requires that each employee first download special web conferencing software to enable a group connection and the use of group tools. The provider should support a voice over IP (VoIP) connection using each participant's broadband service, as well as provide a backup dial-in number.

The virtual classroom format tends to work best with courses that are three hours or less of "seat time" in each session. As with the traditional classroom, customization of content is possible. However, the instructor won't be able to determine whether each employee has learned and excelled in necessary skills. In that case, a hands-on lab conducted by a local trainer can supplement the virtual classroom experience.

4. The *webinar* is similar to the virtual classroom format—especially in technical requirements—but may not be as "in-depth" as other formats. It usually consists of a lecture with PowerPoint slides and an extended Q&A session. There's also little customization of content. In some cases, anyone can enroll in a webinar, which means employees from other companies are also in the audience with your employees.

However, many webinar providers will customize a session and schedule it just for your company, with increased interactions that are close to the virtual classroom format. Participants can ask questions during the webinar but, otherwise, interaction is limited.

5. A *hybrid or blended approach* (part classroom, part self-paced or virtual classroom) can be useful when practical training is necessary. Only a short amount of classroom time may be required for demonstrating and verifying skills. The majority of training time can be completed either through virtual classroom or self-paced e-learning. ▲

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your employees should take, in which format the training should be, and the timeframe to complete training, factor in the potential per-employee cost of each of these elements. Training costs money, but it doesn't have to be cost-prohibitive.

You might think that your only expenses will be course enrollment fees, but it's also important to consider the company's loss of employee time, travel expenses for the employee and/or instructor, use of company equipment during a lab, administrative costs for photocopying classroom materials, and so on.

OSHA doesn't set the fees that providers can charge for instruction, so do some comparison shopping. Providers of classroom training will quote a per-student price for a course; the more employees in the course, the lower the per-student cost. Customization and travel are extra.

The logistics of providing classroom training can add significantly to the cost. For example, you may have no choice but to fly the trainer or remote employees to a central location. However, if you're training employees who work at a single facility, you can often hire an OSHA Authorized trainer who lives or works in the area,

eliminating travel expenses.

On the other hand, many providers who resell off-the-shelf online courses cite a per-employee enrollment fee. Since these courses are exactly the same, fees shouldn't vary much from one provider to another. So, check several online providers to make sure you aren't paying more than you need to. And look for discounts for enrolling a group of employees in a particular online course.

If you have an OSHA Authorized trainer on staff, don't fall into the trap of assuming that it's "free" to create your own training program each time you need to train on a new topic. Any time your trainer spends researching, writing or developing presentations, handouts and activities is costing the company money.

Often you'll find it's cheaper to enroll your employees in online courses, or buy videos or other pre-packaged curriculum for your trainer to use. Remember, when a

professional health and safety training company develops a course, it can spread the development cost over hundreds if not thousands of customers. When your company develops its own training program, you only have one company to share in the expense.

step 7: which provider should we choose?

It's time to decide on a training provider, but how can you be sure they're reliable? The following tips will help narrow your prospects and ensure that you choose the right provider from among them.

Ask others: Talk to your colleagues and co-workers about where they received training. If your company successfully contracted with a training provider in the past, that one might be the first on your list. But before you make contact, find out whether the provider completely satisfied your company's needs or else received a poor evaluation.

Rate the site: Your first impression of a provider occurs when you visit its web site. The site should be moderately appealing—not poorly designed nor overly simplistic. Find out what former students have also said about the provider's courses on the site's Testimonials page. If there aren't any testimonials anywhere, this could indicate too many dissatisfied customers.

Examine the literature: Look for course samples, such as classroom handouts or online course screen

shots or demos. Identify each course's detailed description, pre-requisites, seat time, testing, credit hours and regulatory requirements. Download any course description sheets. The site should also display learning objectives that are "SMART" (specific, measurable, attainable, relevant and time-based) for each course listed.

Locate the credentials: Classroom trainers must be designated "OSHA Authorized"; self-paced online courses must be designated "OSHA Accepted." When contacting providers, ask to see proof of their credentials if they're not available on the web site. For classroom instruction, find out who will be presenting the course and what the trainer's qualifications are.

Check for up-to-date instruction: Sometimes, recent changes in regulations or equipment types may not be quickly addressed in self-paced courses. When comparing providers, make sure that the copyright date on all sample or demo materials is recent. Also find out whether instruction is updated on a regular basis.

Locate the support: With self-paced training, identify technical support options. Make sure your employees can reach the provider on a timely basis 24/7 with either phone or live chat, especially if they have questions about the content or difficulty with resources or multimedia players.

Conduct a search: Look any information about the provider that isn't available on its own web site. Also

4) navigation tools are user-intuitive, 5) interactivity with exercises—based as close as possible to real-life work situations—is required, 6) important points are introduced and summarized, 7) testing takes place at the end, and 8) you can return to where you left off if you stopped before the end.

The site should also have a student account link for tracking progress and displaying final grades. In general, avoid courses with poor or no audio narration and those with a bland graphic design; after all, your employees may stop paying attention to a boring presentation that runs for several hours. Take notes on each course and compare how your experience with it stacks up against competitor courses and previous training you've encountered.

visit the trainer's and/or provider's Facebook and LinkedIn pages and other social media sites.

step 8: how should courses be evaluated before training?

If you decide on classroom instruction, prepare a request for quote (RFQ) and send it to your potential list of providers. The RFQ is a formal document that spells out your company's training needs, the necessary course content, number of employees to train, required customization, timeline for completion and so on. After narrowing the number of prospects based on their responses to the RFQ, conduct in-person or phone interviews to find out more about their courses and training approach in detail.

However, if you're interested in a self-paced online course, obtain permission from the provider to sample a similar (if not the same) course. Your purpose is to test the experience from a student's point of view. Verify the course's hardware and software requirements, such as broadband speed and browser type. If videos are embedded in the course, find out how often they pause (called "latency"); if pauses are too frequent or too long, try a faster connection or consult the provider during your next interview.

When playing the course, determine whether:
1) the course loads promptly, 2) the design is simple and attractive, 3) the narration is professional,

step 9: how should skills be evaluated after training?

All training includes testing, in which employees are graded on their knowledge and skills regarding safety procedures and the proper use of equipment and materials. Test scores must accurately represent an employee's level of comprehension of course content. Hence, the test should adequately assess that the course's learning objectives have been achieved.

After employees have finished training, schedule an evaluation—similar to the mock audit you conducted at the beginning of the process—to verify that employees can demonstrate what they've learned. If any employees haven't performed to the degree necessary for safety in their job, consider further training for them as soon as possible, with either a self-paced or classroom refresher course.

Then again, you might have a few employees whose performance will never be improved through training, whether because of their willful neglect, laziness or inability to learn effectively in a certain course environment. These employees may require alternative training, counseling or disciplinary action to ensure that they regularly practice safety habits.

step 10: how should we document training?

For any type of employee training, documentation is essential to ensure that your employees have completed and passed their courses. Documentation is especially important for compliance training. So, keep records of all course-related activities. Records should include notes from the initial mock evaluation, course brochure or syllabus, a printout of each employee's registration form, a copy of the course completion certificate, and test scores, as well as notes on the follow-up evaluation.

Maintaining up-to-date records of employee training demonstrates that your company is complying with regulations. Proper recordkeeping also provides evidence of compliance during a health and safety audit or investigation. OSHA officials will ask you whether employees who were hurt in a work accident had been adequately trained, and you'll need to present this documentation.

and finally...

Reducing work-related illnesses and injuries and improving health and safety at your company should be the primary goal when choosing a training provider. But don't rush out to contact the first one you find on the web. Before doing anything else, understand your company's training needs, select the most appropriate training format, determine the costs and evaluate prospective providers. Taking the previously described 10 steps in order will help reduce the time you search and the expense you pay—plus you'll get your

employees trained in a timely manner. You'll also increase the benefits your employees and your company gain from health and safety training.

Whatever the short-term costs of training, they will be far less than the long-term costs of dealing with an accident. Trained employees contribute to a safer workplace, improving their skills and changing their behaviors so that accidents rarely occur—and those that do occur have minor impact. This adds favorably to a company's bottom line when employees don't have to stop work to clean up after an accident.

In addition, companies that train their employees are complying with regulations. OSHA penalties are generally lower or zero if the proper safety precautions have been taken and the necessary training has been completed. Companies that invest in safety training generally experience fewer workplace accidents, less damage to equipment and resources, less employee turnover and lower Workers Compensation insurance rates. Health and safety training makes common sense for any business, regardless of whether or not it is mandated. ▲

Here are just a few of the valuable tools you'll find at www.oshatrainingreviews.com!

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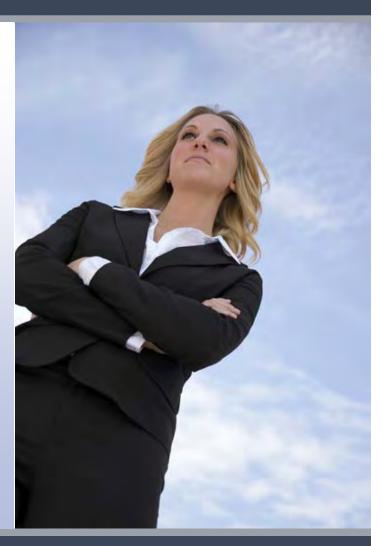- ➢ Federal Employee Training Requirements

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