

Excel's Health and safety training checklist

Important Notes

This checklist matrix gives a list of items that an organization may consider for its health and safety training programme. It would serve as a 'training needs' assessment to comply with e.g. an OHS certified standard.

This is a management list, not a technical list (for example, broken limbs are not included).

The items are presented grouped against various sections for the organization: CEO/Directors, Health and safety manager, General Managers, Technicians (maintenance, service etc), Operators (machines, processes). The last column gives a suggestion on whether the information requires updating on a regular basis.

The checklist is not intended to be totally comprehensive (no checklist can be), and it should be noted that **specific compliance requirements are omitted** to make the checklist generic.

Not all items are of equal importance. Some items may not be applicable.

Excel accepts no responsibility for the use of this checklist without the assistance of Excel Partnership personnel. Errors and omissions excepted.

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An OHS skills training matrix – sheet 1

Not all the training shown here will need to be given at once, and many of the skills will already be known, but this chart serves the purpose of identifying training needs. G = General understanding required; A = Complete understanding required; P = Some require detail, some require general understanding; + = requires periodic updating; - = not applicable						
Management function/group:	CEO Directors	H&S Manager	General Manager	Technicians	Operators	Updating required ?
Legislation requirements						
Health and safety legislation compliance. Regulatory bodies and their powers	G	A	G	P	P	+
"Due diligence" and personal responsibilities	A	A	A	G	G	+
Applicable sector codes and guidelines	P	P	P	P	P	+
Any relevant international legislation	P	G	P	-	-	+
Operational permits and H&S requirements	P	A	P	G	G	+
Interaction with authorisation bodies	A	A	G	G	G	+
External liaison, marketing						
Interaction, communication with stakeholders	A	A	G	G	G	+
Sector codes, Guidelines	A	A	P	P	P	+
Business opportunities and pressures	A	G	G	G	G	+
External communications	A	A	P	P	P	
Management systems						
Total quality principles	A	A	A	G	G	
Strategic planning	A	A	P	-	-	
Integration of systems	A	A	A	-	-	
Operation of an OH&SMS	A	A	A	-	-	+
Policy writing	A	A	-	-	-	
Personnel skills						
Management of change; Motivational skills	A	A	A	G	P	
Objectives setting	A	A	G	P	-	+
Performance measurements	P	A	A	G	G	+
Team building, selection	A	A	P	-	-	
Interpersonal skills	A	A	A	-	-	
Presentation skills	A	A	G	-	-	

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An OHS skills training matrix – sheet 2

Management function/group:	CEO Directors	H&S Manager	General Manager	Technicians	Operators	Updating required ?
Management systems skills						
Procedures writing	-	A	A	G	G	
Company formal reporting	A	G	P	-	-	
Performance measurements and evaluation	G	G	G	P	P	+
Health and safety cost-benefit analysis	G (Finl. Director = A)	A	G	-	-	+
Technical systems skills						
General health and safety science	G	A	G	G	P	+
Hazards/risks analysis techniques	G	A	G	P	P	+
Risk reduction	G	A	G	P	P	+
Incident analysis	G	A	P	P	P	+
Specific technical skills						
Ergonomics	G	A	G	G	G	+
Surgery, nursing, emergency treatment	G	A	P	G	G	+
Use of monitoring equipment	P	A	G	P	P	
Computerised recording, and analysis	-	A	P	P	G	
Calibration techniques	-	A	G	P	G	
Administrative skills						
Documentation, record-keeping	A	A	A	A	A	
Auditing skills						
Management systems auditing methodology	G	A	G	G	P	
Health and safety hazard auditing methodology	G	A	G	G	P	

Comments to be passed back to Excel Partnership:

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