This course is a general introduction to the requirements of effective safety training, and the related OSHA requirements as detailed within OSHA Publication 3824 and 2254, ASSE/ANSI 490.1, and in OSHA regulation 1910.120 App A.
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OSHAcademy Course 121 Study Guide

Introduction to Safety Training

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Contact OSHAcademy to arrange for use as a training document.

This study guide is designed to be reviewed off-line as a tool for preparation to successfully complete OSHAcademy Course 121.

Read each module, answer the quiz questions, and submit the quiz questions online through the course webpage. You can print the post-quiz response screen which will contain the correct answers to the questions.

The final exam will consist of questions developed from the course content and module quizzes.

We hope you enjoy the course and if you have any questions, feel free to email or call:

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**Course Introduction**

More than 100 of OSHA's current standards contain requirements for training. Furthermore, a comprehensive workplace safety program needs to include training. This course outlines information on developing and delivering effective training to workers.

Quality safety and health training helps prevent work-related injuries and illnesses. Effective training also encourages workers by educating and empowering them to advocate for safer working conditions.

Several factors contribute to successful training. One of the most important is ensuring that the trainer exhibits safety and health expertise, sound instructional skills, and flexibility.

In effective training, participants should learn:

- How to identify the safety and health problems at their workplace;
- How to analyze the causes of these safety and health problems;
- How to bring about safer, healthier workplaces; and
- How to involve their co-workers in accomplishing all the above.

This short course is a brief introduction that will help you develop an effective safety training program. For a more comprehensive introduction, you may want to complete OSHAcademy's [36-Hour Train-The-Trainer Program](https://www.oshacademy.com/36-hour-train-the-trainer-program).
Modules and Learning Objectives

Module 1: What is Safety Education?

Learning objectives in this module include:

- Define "education," "instruction," and "training" and how they relate to each other.
- Describe the strategies to increase safety knowledge, skills, and abilities (KSAs).
- Describe documentation requirements and best practices for instruction and technical safety training.
- List at least five topics that are commonly taught using only instruction and five topics that require technical safety training.
- Describe ASSE/ANSI 490.1 minimum criteria for a safety training program.
- Describe OSHA 1910.120, Appendix A, 10 suggested training plan core elements.

Module 2: Trainer Qualifications and Course Development

Learning objectives in this module include:

- Discuss the ASSE/ANSI 490.1 criteria for safety instructor qualifications.
- Describe the three OSHA rule 1910.120 criteria determining instructor competency.
- Discuss the major questions to ask to develop safety training most effectively.
- Discuss the importance of conducting supervisor and manager-level safety training.
- Contrast the characteristics of training and learning goals and objectives.
- Describe at least three safety training presentation strategies.
- Describe the importance of skills demonstrations and retraining.
- List important information to include in technical safety training certification.
Module 1: What is Safety Education?

**Education:** The term "educate" originates from the Latin, *Ed-u-cer-e* (ey-doo-ker-ey), which means "that which leads out of ignorance." Education is anything that brings us out of ignorance and improves our knowledge, skills, and abilities (KSAs).

John F. Rekes, PE, CIH, CSP, says it well: "Education is a process through which learners gain new understanding, acquire new skills, and/or change their attitudes."

Education in its broadest sense is any act or experience that has a formative effect on an individual's mind, character, or physical ability. In its technical sense, education is how society deliberately transmits its accumulated knowledge, skills, and values from one generation to another. *(Wikipedia)*

**Training:** Rekes goes on to describe training as "a more specialized form of education that focuses on developing or improving skills. While training incorporates educational theories, principles and practices, its focus is on performance. The goal of training is for learners to be able to do something new or better than before."

*Is Your Training Program Effective? Occupational Hazards, August 1999*

**The outcome:** The educational process can be quite complex and learning usually takes place on many levels. An educational program can be successful even if the learners can't do anything new or different at the end of the program.

**Quiz Instructions**

After each section, there is a quiz question. Make sure to read the material in each section to discover the correct answer to these questions. Circle the correct answer. When you are finished go online to take the final exam. This exam is open book, so you can use this study guide.

1. What is the basic goal of training?
   a. To do something new or better than before
   b. To learn something new or different than before
   c. To cause new thoughts and feelings as we learn
   d. To open our eyes to new ideas and principles
Safety Education

Safety education informs, persuades, and motivates students to be involved and work safely. The most important goal of safety education is to show why working safely is essential.

Why do you think most employees don't do what they are supposed to do in the workplace? It's because they don't know why it's important to do it! Consequently, the most important thing we can do as safety trainers is to make sure our students know why working safely is important.

The KSA Education Process

What is the process we can use to make sure employees can most effectively educate to improve safety performance? We call it the KSA Education Process. It involves three basic strategies to educate employees to gain knowledge, increase their skills, and improve abilities: instruction, training, and experience.

1. **Instruction** transfers **Knowledge**: This is where the educational process begins. We must know something before we can do something.

2. **Training** provides initial **Skills**: Once we know something, we can focus on learning how to do something.

3. **Experience** over time improves **Abilities**: Learners gain experience outside the classroom, where the "real education" occurs. Only with experience will we improve our overall performance.

| 2. Instruction transfers _____, provides _____, and experience improves ____. |
|---------------------------------|---------------------------------|
| a. skills, knowledge, abilities | b. knowledge, skills, abilities  |
| c. abilities, skills, knowledge  | d. abilities, knowledge, skills  |

Safety Instruction

General safety instruction is usually conducted as a course or meeting in the classroom, online, work floor, or around the tailgate. Instruction may also be given through written notices, newsletters, or videos. Instruction may be quite effective when presenting required and "nice to know" information. For example, general safety instruction may include:
Employee safety orientation;

The steps in a root cause analysis;

Introduction to the elements of our safety management system;

Process safety management principles;

Employee Assistance Program management; or

Engineering control basics.

**Documenting Safety Instruction**

To document instruction, you usually only need an attendance roster. That's because students may not have to prove they've learned anything. If students have to demonstrate they've learned something, then an effective way to do that is with a written test because it formally documents proficiency. Remember, as far as OSHA is concerned, "If it isn't in writing, it didn't get done." This is another reason why it's important to purchase OSHAcademy certificates, cards, and transcripts.

Also, the only evaluation of training required for safety instruction is the student reaction survey. The survey gives trainers feedback about what learners thought about the training topic, the presentation, trainer qualifications, and how strongly they felt the training met their expectations.

3. Which of the following topics can be **effectively** taught with only safety instruction?

a. How to use a table saw
b. How to use fall protection
c. How to install lockout/tagout devices
d. Understand the importance of safety

**Safety Training**

Safety training differs from safety instruction because it focuses on improving "how-to" skills through practice. It takes what the student has learned during instruction and provides an opportunity, through practice, for the student to apply that knowledge.
An important consideration when developing safety instruction and training is determining if OSHA requires a "demonstration" of adequate employee knowledge and skills as part of the training.

Technical "hands-on-how-to" safety training that teaches employees how to do hazardous tasks and procedures is the most common type of safety education. The training may be quite specific and usually requires some form of student hands-on participation or practice.

Remember, even though a particular OSHA Standard does not specifically state or require that employees "demonstrate" proficiency, best practices in safety education may require that you include formal testing, hands-on practice, and a performance demonstration in a training session. Ensure you include hands-on practice and demonstration whenever employees may be injured on a job or if they have a deficiency in KSAs.

4. What is the most common type of technical OSHA safety training?
   a. Videos and slide presentations
   b. Group exercises and discussion
   c. Hands-on-how-to training
   d. Classroom lecture with written exams

Examples: Technical Training Topics

Most OSHA training is technical by nature because it teaches employees how to do things. For instance, when reading about the training employers are required to provide regarding personal protective equipment (PPE) in 29 CFR 1910.132, we see that employers must cover the following topics:

- when PPE is necessary;
- what PPE is necessary;
- **how to** put on, remove, adjust, and wear PPE;
- the limitations of PPE; and
- care, maintenance, and disposal of PPE.
OSHA prefers written exams to test student knowledge of the topic. More importantly, because there is a "how-to" requirement above the training should include a skills demonstration to ensure each student can use the PPE properly.

More examples of hands-on technical safety training include:

- how to use respirators;
- how to remove a machine guard;
- permit-required confined space entry procedures;
- emergency evacuation procedures; or
- lockout-tagout procedures.

5. To make sure employees have the knowledge, skills, and ability to perform a task, make sure hands-on-how-to training includes _____.
   a. a question and answer period
   b. at least 1 hour of instruction
   c. a skills demonstration
   d. a review of the topic

ASSE/ANSI Z490.1, Criteria for Accepted Practices in Safety, Health, and Environmental Training

This consensus standard establishes criteria for safety, health, and environmental training programs. Criteria includes program development, delivery, evaluation and program management.

According to ANSI 490.1, at a minimum, a training program should include the following criteria:

- development piece, including needs assessment, learning objectives, course content and format, resource materials, and criteria for course completion
- delivery by competent trainers in a suitable training environment
• evaluation in a continuous improvement system
• documentation and recordkeeping
• a plan describing how the various training elements will be accomplished

**OSHA's Suggested Training Plan Core Elements**

The following information was adapted from [29 CFR 1910.120 Appendix E, Training Curriculum Guidelines - (Non-mandatory)](https://www.osha.gov/pls/oshaweb/owadisp.show_document?mode=01&sid=17273&d2d_id=56635). Although written specifically for training hazardous waste operations, the core criteria may serve as an excellent template for your safety training program’s design. In the next few sections, we will discuss the ten core criterias.

**Training facility:** The training facility should have sufficient resources available, equipment, and site locations to perform didactic and hands-on training when appropriate. Training facilities should have sufficient organization, support staff, and services to conduct training in each of the courses offered.

**Training Director:** Each training program should be under the direction of a Training Director responsible for the program. The Training Director should have a minimum of two years of employee education experience.

6. According to ANSI Z490.1, a minimum a training program should include each of the following criteria, EXCEPT _____.

   a. a development piece
   b. an enforcement protocol
   c. needs assessment
   d. learning objectives

**Instructors:** Instructors should be deemed competent based on:

• previous documented experience in their area of instruction,
• successful completion of a "train-the-trainer" program specific to the topics they will teach and
• an evaluation of instructional competence by the Training Director
Course materials: The Training Director should approve all course materials to be used by the training provider. Course materials should be reviewed and updated at least annually. Materials and equipment should be in good working order and maintained properly. All written and audio-visual materials in the training curriculum should be peer-reviewed by technically competent outside reviewers or by a standing advisory committee.

Reviewers should possess expertise in the following disciplines where applicable: occupational health, industrial hygiene and safety, chemical/environmental engineering, employee education, or emergency response. One or more of the peer reviewers should be an employee experienced in the work activities directed in the training.

The program for accepting students should include:

- receive assurance that the student is or will be involved in work where exposures are likely and that the student possesses the skills necessary to perform the work; and

- provide a policy on the required medical clearance.

Ratios: Student-instructor ratios should not exceed 30 students per instructor. Hands-on activity requiring the use of personal protective equipment, testing equipment, or hazardous procedures should have instructor ratios of 5-10 students per instructor.

<table>
<thead>
<tr>
<th>7. What should the trainer-student ratio be for hands-on safety training?</th>
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<tbody>
<tr>
<td>a. 1:30</td>
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<tr>
<td>b. 1:5-10</td>
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<tr>
<td>c. 1:1</td>
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<tr>
<td>d. 1:15</td>
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Proficiency assessment: Proficiency should be evaluated and documented using a written assessment and a skill demonstration selected and developed by the Training Director and training staff. The assessment and demonstration should evaluate the knowledge and individual skills developed in the course of training. It's important to understand that "individual," not "group" testing should be accomplished. Asking the "group" questions and receiving answers from one or more group members, is not acceptable.

The level of minimum achievement necessary for proficiency should be specified in writing by the Training Director as follows:
• If a written test is used, there should be a minimum of 20-30 questions. Each student should answer all questions, and a minimum test score of 70% should be required.

• If a skills demonstration is used, the Training Director should fully document the tasks chosen and the means to rate successful completion.

The content of the written test or skill demonstration must be relevant to the objectives of the course. The written test and skill demonstration should be updated to reflect changes in the curriculum, and the Training Director should review and approve any updates.

Regardless of the approach or combination of approaches used, the Training Director should justify, document, and approve the proficiency assessment methods. The proficiency of those taking the additional courses for supervisors should be evaluated and documented by using proficiency assessment methods accepted by the Training Director. These proficiency assessment methods must reflect the additional responsibilities of supervisory personnel in hazardous waste operations or emergency response.

8. What are the two primary methods for measuring student proficiency in safety training?
   a. Skills demonstration and written test
   b. Practice and open-book exam
   c. Group testing and question/answer session
   d. Written/Oral exams composed of essay questions

Course certificate: Each student who satisfactorily completes the training course should be provided with written documentation. Certificates and cards provide a permanent record of your training achievements and should be kept in the employee's possession.

The documentation should include:

• student name;

• course title;

• course completion date;

• a statement that the student has successfully completed the course;

• name and address of the training provider;
• an individual identification number for the certificate; and

• list of personal protective equipment authorized for use (if required).

This documentation may include a certificate and an appropriate wallet-sized card of the above information. When such course certificate cards are used, the training certificate’s individual identification number should be shown on the card.

9. Why are safety training certificates and cards important?

a. They prove you have skills and abilities
b. They look good and are suitable for at least a year
c. They provide a permanent record of achievement
d. They protect you against legal prosecution

Recordkeeping: Training providers should maintain records listing the dates courses were presented, the names of the individual course attendees, the names of those students successfully completing each course, and the number of training certificates issued to each successful student. These records should be:

• maintained for a minimum of five years after the date an individual participated in a training program offered by the training provider, and

• available and provided upon the student's request or as mandated by law.

Program quality control: The Training Director should conduct or direct an annual written audit of the training program.

• The Training Provider should document, approve, and implement any program modifications to address deficiencies.

• The audit and the program modification documents should be maintained at the training facility.

Download the complete CFR 29 1910.120, Appendix E.

Download a Sample Training Plan (pdf format).
10. How long should the employer maintain safety records?

   a. As long as the employee is employed
   b. At least five years
   c. Up to five years
   d. Until training is updated
Module 2: Trainer Qualifications and Course Development

ANSI Z490.1-2016 Instructor Qualifications

Trainers should be "competent" in developing and implementing the various elements of a safety training program.

Trainers can gain competency by achieving an appropriate level of technical knowledge, skills, and abilities (KSAs) in the subjects they teach. They can gain these skills through training, continuing education, and of course, on the job experience.

Trainers should be:

- competent in effective safety training delivery techniques,
- able to use methods that are appropriate to employee learning preferences, and
- able to apply adult learning principles appropriate to the target audience and the learning objectives.

It's important to document trainer competency by maintaining course completion certificates, experience records, licensing, and other documents. The methods used to document trainer competency is left to the discretion of the employer.

1. According to ANSI 490.1, to be competent, safety trainers must have adequate _____ to conduct training.
   a. a professional credential
   b. knowledge, skills, and abilities (KSAs)
   c. be on the job at least two years
   d. a formal college degree

Trainer Qualifications

Instructors should be deemed competent based on the criteria below:

1. **They have previous documented experience** in their area of instruction. Job descriptions, performance appraisals, and statements by co-workers or managers would help document previous experience.
2. **Successful completion of a "train-the-trainer" program** specific to the topics they will teach. A typical train-the-trainer course will discuss best practices in adult training principles and provide an opportunity to practice presenting instruction and training in the subject area they will be expected to train.

3. **They possess an evaluation of instructional competence** by the Training Director. If you don't have a Training Director, the Human Resource Manager or another qualified trainer may evaluate the instructor's training skills.

OSHA rule **1910.120(e)(5)** Qualifications for trainers: Trainers shall be qualified to instruct employees about the subject matter presented in training. Such trainers shall have satisfactorily completed a training program for teaching the subjects they are expected to teach, or they shall have the academic credentials and instructional experience necessary for teaching the subjects. Instructors shall demonstrate competent instructional skills and knowledge of the applicable subject matter.

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2. According to OSHA 1910.120, to be considered qualified, trainers must meet each of the following criteria, EXCEPT _____.

   a. completing a "train-the-trainer" program
   b. obtaining sufficient academic credentials and experience
   c. having instructional skills and knowledge of the subject
   d. completing the OSHA 10-Hour Outreach Training course

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**Trainer Evaluation and Annual Review**

Instructors should be required to maintain professional competency by participating in continuing education or professional development programs or by successfully completing an annual refresher course and having an annual review by a training director or other competent manager.

The annual review should include observation of an instructor's delivery, a review of those observations with the trainer, and an analysis of any instructor or class evaluations completed by the students during the previous year.

Source: 1910.120 App E, Training Curriculum Guidelines - (Non-mandatory)
Management Involvement

First-line supervisors and managers play a crucial role in safety and health protection because of their responsibility for workers and the work being performed. Effective training of supervisors and managers will address their safety and health management responsibilities as well as information on hazards, hazard prevention, and response to emergencies. Although they may have other safety and health responsibilities, supervisors and managers should be fully involved in training safety to send a strong personal leadership message.

Bottom line: If supervisors and managers can't train safety, how in the world can they supervise and manage it?

3. Which of the following does NOT need to be included in an annual evaluation of safety instructor performance?

   - a. An analysis of class evaluations
   - b. Observation of the instructor's delivery
   - c. A written exam to verify instructor knowledge
   - d. A review of evaluator observations with the instructor

Course Development

Throughout the rest of this module, we will discuss the various principles and best practices of developing safety instruction and hands-on training. For a complete discussion, see OSHAcademy courses 721 Developing Safety Training and 723 Conducting Safety Training.

Is Training the Answer?

The first step in the safety training development process is a basic one; ask questions to determine if training can solve a problem. Whenever employees do not perform their jobs safely, we might assume training will bring them up to standard.

Let's say your supervisor comes to you and says their employees are not using safe procedures. The first assumption might be that they need training. Don't roll over and agree with that assumption. It's entirely possible that training (for those employees anyway) may not be the solution to the problem.

It is possible the supervisor and/or others in the organization may need to accomplish one or more of the following non-training strategies to help make sure employees use safe procedures and practices:
Use engineering controls to correct existing hazards.

Provide adequate resources to work safely.

Adequately enforce safety rules.

Who knows, maybe the supervisor and others need the training! Let's not always assume employee safety training is the solution for unsafe behavior.

Check out the online decision-tree checklist exercise at the end of this module to ask the right questions if someone requests safety training. You can download a similar checklist (pdf) to help you determine if training is the answer to a performance problem.

4. What is the first step in the safety training development process?

   a. Determine the number of employees to be trained
   b. Develop training goals and objectives
   c. Ask if a problem can be solved with training
   d. Determine the anticipated length of the course

Necessary Training

If the problem can be solved in whole or in part by training, the next step is to determine what training is needed. For this, it is necessary to identify what the employee is expected to do and in what ways, if any, the employee's performance is deficient.

When designing a new training program or preparing to instruct an employee in an unfamiliar procedure or system, a job hazard analysis can be developed by examining engineering data on new equipment or the safety data sheets on unfamiliar substances. The content of the specific OSHA standards applicable to a business can also provide direction in developing training content.

If learning needs can be met by revising an existing training program rather than developing a new one, or if employees already have some knowledge of the process or system to be used, appropriate training content can be developed through such means as:

1. Requesting employees to provide descriptions of their jobs, including the tasks performed and the tools, materials, and equipment used.
2. **Observing employees at the worksite** as they perform tasks, asking about the work, and recording their answers.

3. **Examining similar training programs** offered by other companies in the same industry, or obtaining suggestions from such organizations as the American Society of Safety Engineers (ASSE), National Safety Council (NSC), and insurer and OSHA consultants.

Employees can provide valuable information on the training they need. Employees’ responses to the following can help identify safety and health hazards:

- If anything about their jobs frightens them;
- If they have had any near-miss incidents;
- If they think they are taking risks; or
- If they believe their jobs involve hazardous operations or substances.

5. **What is an effective method for developing a curriculum for procedures for which employees are unfamiliar?**

   a. Purchase a video on the topic
   b. Conduct a job hazard analysis of the procedure
   c. Look for previous training on the topic
   d. Check for information online

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**Supervisor and Manager Safety Training**

Some organizations consider the safety and health function as a human resource or staff responsibility. They fail to understand safety as an integrated part of overall operations (production or service). Even worse, they believe safety education is not required for line managers because it's not a "line" responsibility: it's a "staff" function. Consequently, some employers may not adequately educate managers about general safety and health concepts and how to apply them in the workplace.

Managers who understand both the manner and the extent to which effective safety and health protection impacts the overall effectiveness of the business itself are far more likely to ensure that the necessary safety and health management programs are designed and performed well.
First-line supervisors play a critical role in safety and health protection because of their first-line responsibility for workers and for the work their employees perform. Effective training of supervisors will address their safety and health responsibilities as well as information on hazards, hazard prevention, and response to emergencies. A short list of topics for supervisor safety training include:

- how to conduct a safety inspection
- hazards in their specific workplace
- how to conduct an accident investigation
- how to properly recognize and discipline employees
- what is safety leadership
- how to conduct a Job Hazard Analysis
- how to apply hazard control strategies
- introduction to the safety management system
- how to conduct on-the-job training (OJT)

6. Why may management not place adequate emphasis on safety training for managers and supervisors?
   
   a. Only "exposed" employees need safety training
   b. Safety is just the "cost of doing business"
   c. They believe safety is a "staff" responsibility
   d. OSHA does not require training for managers

Writing Goals and Objectives

One of the most important, yet for some, the most challenging activities in the training process is writing clear-cut, competency-based learning objectives that describe what the learner will be able to do at the end of the training session. Some trainers believe goals and objectives are the same things; not so. Let's take a look.
What is a Goal?

A goal is nothing more than a wish. We've all stated goals like, "I wish I could lose some weight," from time to time. Goals are broad in the sense that they state general intentions. They are not specific enough to be measured. Objectives, on the other hand, are narrow and are set for specific tasks in particular. There are two basic types of goals:

A training goal is a general statement about what the trainer wants to do. It states how the trainer will achieve the intended outcome of training. Instructor guides may state training goals, but student workbooks or handouts might not.

On the other hand, a learning goal is a general statement about what the trainer wants each student to know and/or do. It summarizes what the learner, not the trainer, will know or be able to do. Student workbooks or handouts would include learning goals.

What's an Objective?

Objectives are much more specific than goals. They state observable, measurable outcomes - what we do and how well we do it.

A training objective is a specific statement describing what the trainer will do during or immediately after training. For instance, a training objective might state: "During the first hour of the training session, the trainer, given a full-face respirator, will discuss and perform each step of the respirator don-doff procedure."

A learning objective is a specific statement describing what the learner will know and/or can do after training. It describes results rather than the means of achieving those results. It defines expectations for the learner. For example, a learning objective might state: "By the end of the class, each student, when given a full-face respirator, will be able to perform all steps of the don-doff procedure correctly."

Writing learning objectives is required by ANSI Z490.1 guidelines when hazardous procedures and practices are taught. Virtually all technical safety training involves testing. Because companies must test employees, learning objectives are necessary to design specific training measures and standards.
7. The statement, "By the end of training, the student will be able to describe all steps in the equipment lockout/tagout procedure," is an example of a _____.

   a. training goal  
   b. learning goal  
   c. training objective  
   d. learning objective 

Learn by Doing!

Once the objectives for the training are precisely stated, then learning activities can be identified and described. Remember, when OSHA uses the terms "demonstrate" in their standards, the intent is that employees must be able to prove they can do something by actually doing it in the learning environment. This means you'll need to include a "hands-on" learning activity to show employees how to do things. It also means you'll need to give them a chance to practice.

Training Presentation Strategies

You now know what subjects you're going to present, but which presentation strategy will work best for you? Let's take a look at several alternatives:

- **Formal classroom training:** In many cases, formal in-hour training or training from an external source can quickly train learners when needed. Here's a simple Classroom Training Model.

- **On-the-job training (OJT):** OJT is considered the best overall training strategy since most safety training requires that employees demonstrate (prove) adequate knowledge and skill to perform procedures and practices. Remember, companies must train employees before exposure! Conducting a simulated procedure or task in the learning environment is the only way to certify adequate knowledge and skills to perform hazardous tasks without exposing the employee to actual hazards. Here's a Safe OJT Training Model.

- **Mini training sessions:** This method is perhaps the best method to keep employees up on the latest changes to OSHA standards and changes in company policy, procedures, and rules. Mini training sessions, tailgate meetings, and safety meetings can be as short as five minutes or up to 30 minutes.
• **Distance learning**: This learning strategy is growing in popularity because employees can fit short training sessions on the computer into their work or home schedules. Distance learning is primarily instruction. Many OSHA training standards require hands-on demonstration of skills using specific equipment. [More on this subject.](#)

### 8. What is considered the best overall safety training strategy?

a. On-the-job training (OJT)
b. Formal classroom training
c. Distance learning
d. Tail-gate meetings

**Important Training Requirements**

No matter the training strategy used, it is essential to ensure employees practice before being exposed to actual hazards in the work environment. Some of the key requirements are stated or implied in OSHA rules. Three of the most important are:

- **Demonstration**: Workers should have the ability to demonstrate that they have both the knowledge and ability to safely perform a hazardous task or procedure before they are allowed to begin work. The tests to determine if students have adequate knowledge, skills, and abilities (KSAs) is as follows:
  - If they can teach the instructor how to perform a procedure, they have demonstrated adequate knowledge. To prove employees have adequate skills, the instructor can evaluate employees in the learning environment.
  - To determine an employee’s abilities, a competent person can evaluate the employee while performing the workplace procedure.

- **Retraining**: Any time the employer believes a worker lacks adequate knowledge or ability to perform a task safely, *that worker should receive retraining* to improve their proficiency.

- **Certification**: Employees who must perform a hazardous task or procedure should be certified as "qualified" by the employer. In most instances, an attendance roster, by itself, will not be considered adequate documentation for most safety training.
Ultimately, the employer is responsible for certification. It's also important to realize that OSHA does not "certify" anyone qualified to do anything... they just don't do it.

9. As an instructor, how can you know that your students have adequate knowledge about the procedure you are teaching them?

   a. The class reviews all questions on the exam correctly
   b. They pass a written test with a score of 70% or higher
   c. They can each teach the instructor how to do it
   d. The class can answer oral questions as a group

Documenting the Training

The employer needs to keep complete and accurate records of all safety and health training by the provider (like OSHAcademy) because more than 100 OSHA standards require it. It is also recommended by ANSI Z490.1. Here are just a few reasons why strong documentation is important:

- Records can provide evidence of the employer's good faith effort to comply with OSHA standards.

- Strong documentation can also help the employer defend against claims of negligence.

- Documentation can also supply an answer to one of the first questions an OSHA accident investigator will ask: "Was the injured employee adequately trained to do the job?"

Attendance Rosters

If a class or safety meeting presents general information related to safety, an attendance roster will likely satisfy documentation requirements. If a class or safety meeting includes any testing, document the results.

Formal Certification of Training

When safety training requires employees to demonstrate adequate knowledge, skills, and ability to perform hazardous tasks or procedures, an attendance roster may not be legally sufficient to document the training.
Technical safety training should include a formal certification. Certification of training usually involves issuing a certificate of competency or qualification. To make your training documentation strong, you may want to consider including the following information:

- trainee statement that they were provided with an opportunity to ask questions and perform procedures and practices
- trainee statement of intent to comply with the procedures, practices, policies, and rules
- trainee statement of understanding that failure to comply may result in discipline
- trainer statement that trainees, through testing, demonstrated adequate knowledge
- trainer statement that they conducted a measurement (testing) of knowledge and skills and that trainees met or exceeded required levels of performance
- a list or description of the specific training subject(s) -- describe the safety procedures, practices, policies, rules addressed in training
- a list or description of the specific procedures practiced in the learning environment
- certification - a place for trainee, trainer, and supervisor signatures

*Last words: As far as OSHA is concerned... If it isn't in writing, it didn't get done! Thoroughly document training.*

**10. When safety training requires employees to perform hazardous tasks or procedures, the training is most effectively documented _____.

   a. with an attendance roster
   b. with an instructor and supervisor certification
   c. immediately after training is completed
   d. using OSHA-approved forms
**Additional Resources**

1. [Publication 3824, Resource for Development and Delivery of Training to Workers](#), OSHA
2. [Publication 2254, Training Requirements in OSHA Standards](#), OSHA
3. [1910.120 Appendix E, Training Curriculum Guidelines (Non-mandatory)](#), OSHA
5. [eTools, eMatrix, Expert Advisors and v-Tools](#), OSHA
6. [Assessing Occupational Safety and Health Training](#), NIOSH
7. [Napo’s Films](#), Via Storia