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Occupational health and safety training

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Standards Update Service

Z1001-13

March 2013

Title: *Occupational health and safety training*

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Z1001-13
***Occupational health and safety
training***



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*Published in March 2013 by CSA Group
A not-for-profit private sector organization
5060 Spectrum Way, Suite 100, Mississauga, Ontario, Canada L4W 5N6*

*To purchase standards and related publications, visit our Online Store at shop.csa.ca
or call toll-free 1-800-463-6727 or 416-747-4044.*

ISBN 978-1-77139-179-5

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Preface

This is the first edition of CSA Z1001, *Occupational health and safety training*.

This Standard addresses the needs of an organization to provide consistent quality occupational health and safety (OHS) training for workers, managers, and supervisors, as well as for health and safety committees and representatives.

ANSI Z490-1, *Criteria for Accepted Practices in Safety, Health, and Environmental Training*, was used as the seed document for the preparation of this Standard, with permission of the American National Standards Institute (ANSI).

CSA Group acknowledges that the development of this Standard was made possible, in part, by the financial support of federal, provincial, and territorial OHS government agencies, with additional contribution from the Canadian Society of Safety Engineering (CSSE).

This Standard was prepared by the Technical Committee on Occupational Health and Safety Training, under the jurisdiction of the Strategic Steering Committee on Occupational Health and Safety, and was formally approved by the Technical Committee.

Notes:

- 1) Use of the singular does not exclude the plural (and vice versa) when the sense allows.
- 2) Although the intended primary application of this Standard is stated in the Scope, it is important to note that it remains the responsibility of the users of the Standard to judge its suitability for their particular purpose.
- 3) This Standard was developed by consensus, which is defined by CSA Policy governing standardization — Code of good practice for standardization as “substantial agreement”. Consensus implies much more than a simple majority, but not necessarily unanimity”. It is consistent with this definition that a member may be included in the Technical Committee list and yet not be in full agreement with all clauses of this Standard.
- 4) To submit a request for interpretation of this Standard, please send the following information to inquiries@csagroup.org and include “Request for interpretation” in the subject line:
 - a) define the problem, making reference to the specific clause, and, where appropriate, include an illustrative sketch;
 - b) provide an explanation of circumstances surrounding the actual field condition; and
 - c) where possible, phrase the request in such a way that a specific “yes” or “no” answer will address the issue.

Committee interpretations are processed in accordance with the CSA Directives and guidelines governing standardization and are available on the Current Standards Activities page at standardsactivities.csa.ca.

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 - a) Standard designation (number);
 - b) relevant clause, table, and/or figure number;
 - c) wording of the proposed change; and
 - d) rationale for the change.

Z1001-13

Occupational health and safety training

0 Introduction

0.1 General

This Standard addresses an organization's need to be able to select and provide appropriate occupational health and safety (OHS) training to ensure workers, as defined in Clause 3, are suitably trained to perform their work. Training should meet the needs of the organization as well as those being trained. It is important that training be designed by individuals with appropriate qualifications and subject matter expertise and that delivery of training be done in a way that is conducive to learning.

This Standard specifies requirements for and provides guidance on the activities required to manage all aspects of an OHS training program in accordance with the Plan-Do-Check-Act cycle and management system principles, such as those set out in CAN/CSA-Z1000, *Occupational health and safety management*.

Support for the development of competence through training is an integral part of OHS management. The goal of training is to help workers and other parties develop and achieve the knowledge, skills, and ability to perform their work in a manner that reduces risk of harm from work-related hazards. CSA Z1002 *Occupational health and safety – Hazard identification and elimination and risk assessment and control* specifies requirements for identifying and eliminating hazards and assessing and controlling risk from hazards that cannot be eliminated. Organizations should consider all types of risk controls as outlined in CSA Z1002 and how training fits into the overall picture for effective risk reduction. Training is a method of an administrative risk control and is seldom used in isolation of other types of risk controls. In fact, training is often necessary to ensure hazards eliminated from the workplace are not reintroduced and to help workers work with the other controls that have been implemented.

0.2 Stakeholders

Various stakeholders can be involved, including

- worker(s);
- organization(s) that employ workers to carry out such work;
- individual(s) responsible for ensuring that the organization's workers are qualified to carry out such work;
- organization(s) and/or individual(s) who design training for OHS matters; and
- organization(s) and/or individual(s) who deliver training for an organization (this may or may not be the same organization(s) and/or individual(s) who design the training).

It is recognized that organizations might not have the resources or expertise to design and deliver all appropriate OHS training to their own workers.

Note: *Training development and delivery can include external contractors or suppliers of products, processes, or services.*

0.3 Structure of this Standard

This Standard is structured as follows:

Clause 4 specifies the requirements for management and administration of OHS training within the management system (if present) of an organization and includes the roles and responsibilities for workplace parties.

Clause 5 specifies the requirements for the establishment and maintenance of the organization's OHS training program. The training program includes an assessment of the organization's training needs and forms the framework for ensuring that workers have the necessary qualifications to perform their work and that the training meets the organization's needs.

Clause 6 specifies the requirements for training courses. In particular, it specifies the requirements for ensuring that specific training courses and training providers meet the organization's needs as outlined in the training program. It outlines requirements for

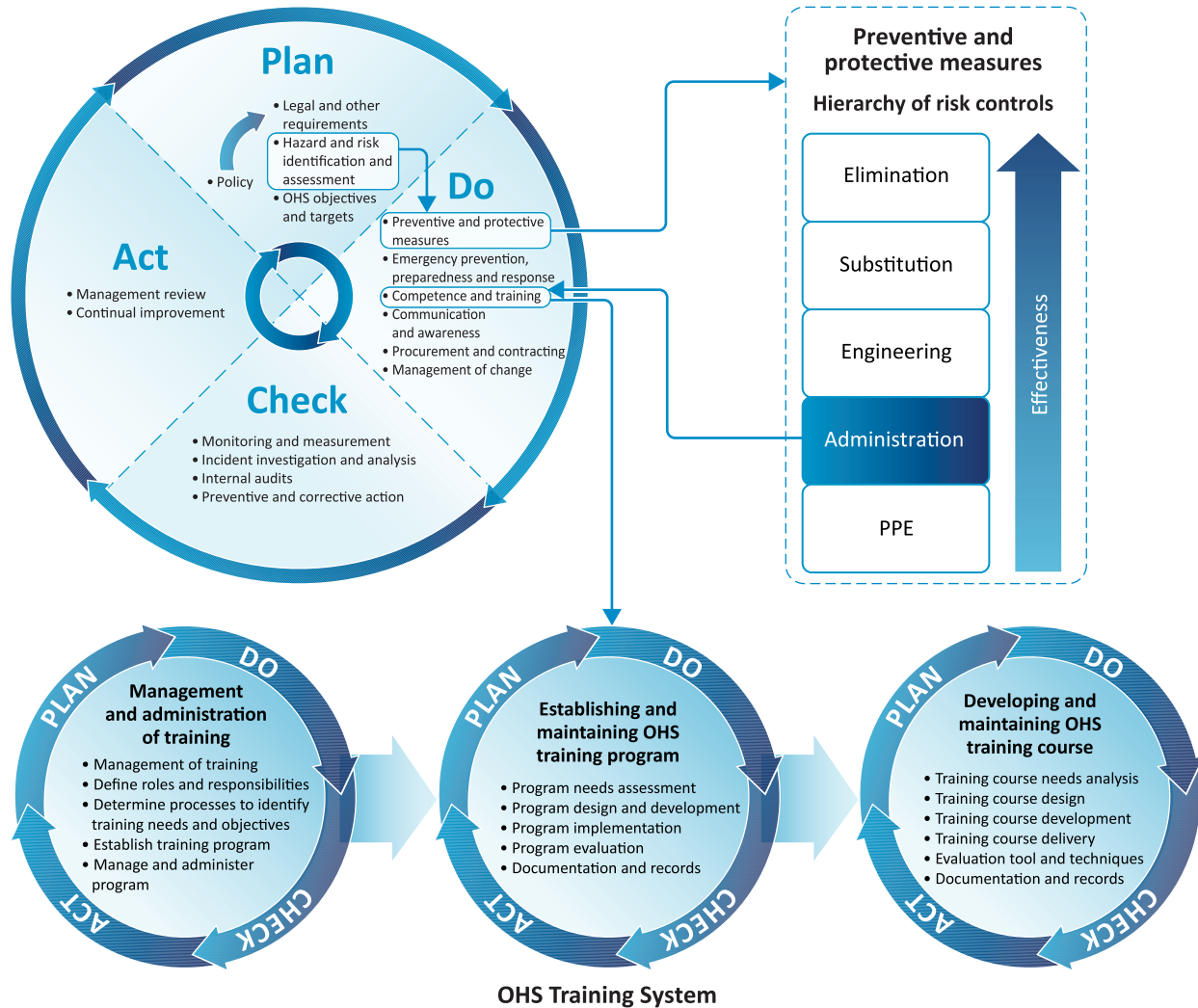
- development of course descriptions as part of the organization's program; and
- selection of training products and/or services.

It is recognized that many organizations might not have the resources or expertise to develop, design, and deliver all OHS training courses in-house. In addition to the requirements for organizations listed above, Clause 6 also specifies requirements for training designers and providers, including

- qualifications of individuals involved in training course design;
- development of training course content;
- delivery of the training course;
- requirements for completion;
- training course and training provider evaluation; and
- continual improvement.

Note: Figure 1 illustrates the relationship of requirements in this Standard with the elements of OHS training.

Figure 1
Training elements
 (See Clause 0.3.)



With these requirements in mind, organizations, training developers, and training providers should be able to work together to meet the goal of supporting the development of competence through training.

1 Scope

1.1 Scope

This Standard specifies requirements for management and administration of OHS training, identification of OHS training needs, and outlines the development, implementation, and maintenance of an OHS training program and courses. It also specifies how to select training providers with the appropriate qualifications and the requirements for the design and delivery of OHS training courses. Informative Annexes provide guidance on how to implement the requirements of this Standard, including topics to be covered in training for health and safety representatives and committee members; managers and

supervisors; and new workers. Samples of a training matrix, course evaluation form, and training assessment survey are also included that can be customized for the specific needs of the user.

1.2 Purpose

The purpose of this Standard is to provide guidance to organizations and training providers on accepted practices for OHS training.

1.3 Exclusions

This Standard is focused on formal training, which includes some form of formal evaluation in order to measure the learning achieved. Therefore, this Standard specifically excludes instructional activities delivered outside a formal training program that do not include formal evaluation of the learning through testing or other formalized methods. This exclusion covers instruction that can be delivered by a trained or untrained educator, as well as “toolbox talks”, “tailgate talks”, informal on-the-job training, or other forms of delivery that do not include a formal evaluation of the learning through testing or other evaluation methods.

This Standard does not specify a training delivery method. The principles and requirements specified in this Standard apply to any type of training service or product (e.g., theoretical, practical, class-room, in-the-field, on-the-job, on-line, etc.).

Notes:

- 1) *Training is defined in Clause 3 of this Standard and requirements are specified in Clauses 4 to 7.*
- 2) *See Clause 6.4.3 for an explanation about the activities excluded.*

1.4 Application

This Standard is applicable to organizations of any size or type that have workers and to organizations and individuals who design, develop, and/or deliver OHS training products and/or services.

1.5 Relationship to legal requirements

At the time of publication of this Standard, legal requirements respecting OHS training differed from jurisdiction to jurisdiction in Canada. It is the user's responsibility to determine how applicable legislative requirements relate to this Standard.

1.6 Terminology

In this Standard, “shall” is used to express a requirement, i.e., a provision that the user is obliged to satisfy in order to comply with the standard; “should” is used to express a recommendation or that which is advised but not required; “may” is used to express an option or that which is permissible within the limits of the standard; and “can” is used to express possibility or capability.

Notes accompanying clauses do not include requirements or alternative requirements; the purpose of a note accompanying a clause is to separate from the text explanatory or informative material.

Notes to tables and figures are considered part of the table or figure and may be written as requirements.

Annexes are designated normative (mandatory) or informative (non-mandatory) to define their application.