



# INVOLVING YOUR WORKFORCE IN SAFETY

GUIDANCE

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## OVERVIEW

Communication on health and safety is a two-way process between you and your employees where you:

- talk to each other about issues;
- listen to their concerns and raise your concerns;
- seek and share views and information;
- discuss issues in a timely manner; and
- consider what employees say before you make decisions.

This guidance will take you through the process of how to communicate effectively with your workforce from getting started to getting it right. We recognize you will be at different stages along the process. For example, your starting point may be ‘Get it right’ rather than ‘Get started’.



## INTRODUCTION

Health and safety at work is about securing the health, safety and welfare of people at work by identifying hazards and reducing the risk to the employees from those hazards. As an employer or manager, managing safety sensibly in your organization and involving your employees is at the very heart of this.

Employee involvement creates a genuine partnership between you and your employees. It creates a culture of collaboration where concerns, ideas and solutions are freely shared and acted upon, where the whole workforce is engaged in promoting a safe working environment.

In most cases, effective communication systems will generate levels of involvement that improve performance and raise standards across many areas - not just safety.

If you have a small organization, communication can be an informal process of talking to your employees regularly and considering their views when you make decisions about safety.

Communication and involvement do not remove the right of employers and managers to manage. You must still make the final decision but talking to your employees is an important part of successfully engaging and managing safety in your organization.

## PUBLIC SECTOR REGULATION

Montana is under Federal OSHA jurisdiction which covers most private sector workers within the state. State and local government workers are not covered by federal OSHA. However, the Montana legislature enacted Montana Safety Culture Act (MCA 39-71-1505) which provides rulemaking authority and defines the requirements of a Safety programs for state and local governmental employers. The Montana Department of Labor and Industry adopts a safety code for every place of employment conducted by a public-sector employer. This safety code adopts the following occupational safety and health (OSHA) standards from the Federal Occupational Safety and Health Administration Act, (Code of Federal Regulations Title 29, Parts 1910 and 1926).

The Montana Safety Culture Act requires management to implement an effective safety and health program and to communicate its commitment to the safety and health of its employees as an organizational goal. For employers with more than 5 employees, this commitment requires development of safety committees, policies, and procedures that assign specific safety responsibilities and safety performance accountability. Procedures should outline the steps to report, investigate and take corrective action of work-related incidents, injuries, fatalities and known unsafe work conditions. This requirement for safety policies and procedures mirror the requirement outlined in federal OSHA for private sector employers.

## GET STARTED: PREPARE

This section is about preparing to involve your workforce. It explains;

- Why you should talk to your employees about safety and;
- How to gain commitment from your organization.

## WHY TALK TO EMPLOYEES ABOUT SAFETY

Incident rates are lower when employees feel they have a say in safety matters, as opposed to workplaces where employees are not involved.

Talking, listening and cooperating with each other can help:

- employers learn about the risks to employees in the workplace through communication.
- employees influence safety through their own actions. They are often the best people to understand the risks in their workplace.
- identify joint solutions to problems;
- improve employee morale;
- develop a positive safety culture where risks are managed sensibly;
- reduce accidents and ill health, plus their related costs to your organization;
- bring about improvements in overall efficiency, quality and productivity;
- meet internal and external customer demands and maintain credibility; and
- comply with legal requirements.

A workforce who feels valued and involved in decision-making is key to maintaining a high-performing workplace. Empowering your workforce, giving them the right skills, and getting them involved in making decisions shows them that you take their health, safety and wellbeing seriously. There is an impact beyond safety management if the workforce is not engaged in safety issues which directly impact them.

## GAINING COMMITMENT

Commitment from all sides is vital for employee involvement to be effective and successful in making improvements to health and safety. It is important to gain leadership and management commitment. You can do this by building a case in several ways.

- highlight how co-operating with employees in other areas of the organization has led to improvements;
- look at current safety issues which could be addressed through consultation.
- for example, if you see an increase in a type of injury, discuss the best way to address it;
- explain that engaging the workforce is an investment;
- identify opportunities where consultation with employees can be held and how this will be accomplished.

## GET ORGANIZED: PLAN

This section will help you to plan effectively and covers:

- what affects how you involve your workforce;
- what you should communicate with your workforce about;
- when you should communicate so that you do it in a timely manner; and
- training for safety representatives.

### What affects how you involve your workforce?

When planning how best to involve your employees, you need to consider the following factors about your organization, your workplace and the workforce that will have an impact on how you engage your employees.

These factors will affect whether you communicate with individuals or representatives, the methods you use, organization of inspections and investigations, and coordination between committees.

#### ***The organization***

- Structure of the organization.
- Management style.
- Organizational and safety cultures.

#### ***The workplace***

- Size of workplace.
- Location of sites.
- Types of work done.
- Degree and nature of inherent dangers.

#### ***The workforce***

- Size of workforce.
- Diversity of the workforce.
- Employment structures (e.g. direct employees versus contract workers).
- Work patterns such as shift systems, part-time etc.
- Offsite, remote or mobile workers.

## WHAT SHOULD YOU COMMUNICATE?

The specifics will vary from workplace to workplace. In general, you should communicate:

- any change which may have a substantial impact on your workforce's safety. Such changes may include new or different procedures, types of work, equipment, premises, and ways of working (e.g. new shift patterns), contractors on site;
- information you must give your workforce on the hazards and risks to them from those hazards and precautions they should take. Discuss with employees and representatives the best way for information to be shared. Consider issues of language, literacy and disabilities if appropriate.
- Safety concerns.
- the planning of safety training; and
- the safety consequences of introducing new technology or tools.
- Risk assessment outcomes that may affect employees.

Simply asking an employee how their day is going, do they have any issues, how their week is going, were there any issues with travelling from site to site, can prompt a safety conversation.

### Practical example

Don't limit the scope of communication to a pre-set list because there will be times when you should involve employees about issues which are not on your list. Be open to input.

Communicate and involve employees and safety representatives on:

- accident and investigation reports, risk assessments, and emergency plans;
- occupational health issues including what the provision (for employees) is and how effective it is; and
- the nature of the job, knowledge needed and experience suitable for the role of your competent person (e.g. Safety manager).

It is important to provide feedback to explain decisions and respond to issues raised by employees or their representatives. The appropriate method of responding (in writing or verbally), and reasonable timelines for providing a response will depend on the nature and circumstances of the issue and the workplace. The actions should be agreed upon with your employees or their representatives in advance. This is crucial in developing trust between management and employee.

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## WHEN SHOULD YOU COMMUNICATE?

Communicating with employees means time must be set aside. Time to explain the issues to employees, time for them to consider the message and provide input back to you, and time for you to consider their response before making your final decision.

Regular communication is better than on a case-by-case basis as issues come up because it allows you to spot potential problems early.

A simple issue where you need to talk to a smaller number of representatives can probably be dealt with in a few days or addressed routinely. A technical matter requiring time for consideration or communicating with an entire large workforce, is likely to require a longer scheduled timeframe.

### Practical example

Identify convenient times you can consult with employees to discuss their day and any safety issues. Agree to respond to the issues raised within a certain time frame. Include them in decisions where appropriate. It will demonstrate that you are committed to them and that you have considered what they say.

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For unexpected issues, you will not have had time to plan the communication. For these occurrences, consider if the issue can be addressed through one of your usual communication methods or if something different like a one-off meeting is needed.

## GET IT DONE: COMMUNICATE & INVOLVE

This section provides practical advice on ways to communicate and involve your employees or their representatives. It explains:

- methods of involving your employees;
- how to involve employees in investigations and inspections; and
- how to set up a safety committee and make it work well.

### Provide facilities and assistance

You should provide your representatives with facilities they may reasonably need to carry out their role. Although the needs of safety representatives will vary from workplace to workplace, in general you should make sure they have access to equipment and assistance such as:

- a telephone and office area where they can have a private and confidential conversation as part of their role;
- suitable storage space for paperwork, records or reference material, such as a lockable cabinet or desk;
- intranet and internet facilities;
- communication and distribution facilities like a photocopier and a notice board to circulate information to the employees they represent; and
- time with senior management to discuss safety issues whenever the representative might reasonably need to.

You should also allow representatives to have facilities for investigation of hazards, complaints, and incidents including discussions with employees.

### Provide information

You must provide safety information that will allow your safety representatives to fulfill their role. You should already have relevant safety information as part of your safety management system including copies of risk assessments, job analysis', accident records, accident investigations, safety committee meeting minutes.

You should give your employees and representatives information that lets them understand:

- what the risks and dangers are for their work or changes to their work area or process, which will affect their safety.
- what is in place or can be put in place to reduce or eliminate the risks and dangers;
- what to do when they identify a risk or dangerous situation; and
- the name of the competent person responsible for subject matter expertise.

**Do not give employees or their representatives any information that:**

- would be against the interests of national security or against the law;
- is about someone who has not given their permission for it to be shared;
- would harm the organization;
- relates to legal proceedings;

- relates to privacy regulation.

## WHAT ARE THE BEST WAYS TO COMMUNICATE?

The method you use to involve your employees will depend on:

- whether you are involving individuals directly or communicating with your employee representatives; and
- the specific safety issue you wish to communicate.

The different methods of communicating with your employees include:

- face to face- directly with individuals;
- indirectly (over the phone) with employees; and
- through managers, supervisors or employee representatives.

You can use a range of methods to suit the circumstances and use a combination if a single method is not suitable. If you choose to communicate with employees directly be clear, direct and honest. There are various ways you can communicate with employees face to face:

- **One-to-one discussions** can be particularly effective if you have a small organization and can talk to your employees regularly.
- If your organization is larger, conduct **regular walkarounds** where you meet employees face to face and they can share ideas and concerns with you openly. If you show interest and are regularly approachable, employees are more likely to speak about the risks, especially if you act on the issues raised.
- Have **safety as a standing item** on the agenda of routine team meetings to gain your employees' views. Ensure there is always an opportunity for safety issues to be raised.
- **Special workforce meetings** can be the best option when you need to call the whole workforce together to communicate issues and can listen to their views and opinions. This could be done in addition to regular team meetings. At large meetings, the exchange of views and ideas might not be as effective as in smaller gatherings where people may feel more comfortable sharing their views.
- **Arrange toolbox talks** where you have short talks on specific safety issues that show the relevance of a topic to jobs. For example, a discussion about manual material handling for those doing jobs that involve lifting items. It allows you and your workers to explore the risks and think about ways to address them.
- **Set up work groups** to tackle specific safety issues and explore ways of making a difference. The employees involved in the group should be directly involved with the issues being reviewed so they can contribute valuable and practical solutions. Work groups are also good for understanding issues with outdated and wasteful processes that could have an impact on the safety and wellbeing of employees.

There are also indirect ways you can involve employees:

- **Technology** – Email, webinars, apps **and** company intranet sites with safety information are convenient as they can feature news and request the views of all your staff. Keep the information updated and draw attention to new material so people who do not regularly check it will know what is happening in their workplace. If some staff do not have access to the site, the quality and range of views given may be compromised.



- **Staff surveys** can be useful in communicating with your workforce. It is important to understand what you want to learn from a survey. Structure the questions around a subject/and or area, keep it relevant, think about what you are asking. Too many results and you may not take the correct action or have too many actions and not achieve anything. Ensure you give feedback to employees on results and subsequent actions For example: if you survey an area versus a whole division, then you are more likely to achieve a change that is relevant to that area, which will in turn have an effect on the division. If you take the divisions view, it may not be relevant to the area and could adversely affect that area.
- **Employee suggestion boxes** can be useful if they are regularly used and acted upon. However, they may not work if employees believe they will not make a difference or if you and your employees have already developed a good working relationship without the need for a suggestion box.
- **Notice boards and newsletters** can be useful for sharing information as part of the communication process. It is important to update notice boards regularly. Too many notices, that remain in position for a long time are more likely to be ignored and undermine the purpose of the board. Newsletters should be kept short, eye catching and dated. Remember to remove old and outdated information to keep the message board current.

## Practical example

Think about the different work patterns of your workplace. You may employ teleworkers, part-time workers, shift workers, and use contracted workers. What is the best way to communicate with them all?

### Ways you can communicate with representatives

Communication with representatives usually works better when carried out through a proper forum:

- have a dedicated safety committee. They are particularly effective if you have several representatives for different groups, larger numbers of employees, both union-appointed representatives and employee-elected representatives, or representatives responsible for more than one site.
- Other group meetings.
- One to one meetings or conference calls.

You must make sure that you give safety proper consideration and not just tack them on to the end of lengthy agenda that cannot do them justice.

## INVESTIGATION AND INSPECTION

It is usually a good idea to involve employee elected representatives in joint investigations and inspections for:

- investigating accidents, potential hazards and complaints.
- inspections of the workplace.
- Near miss investigations

## Investigating accidents, hazards and complaints

Agree to a system for informing representatives if an incident occurs and involve them in investigations as soon as possible. Such incidents can be vital signals that your way of preventing or reducing risks and dangers is not working. Proper investigation can show you where the weaknesses are so you can work towards improving worker safety through corrective actions implemented.

## Inspections of the workplace

Formal inspections can take different forms. You and your representatives will need to agree on the best methods for your workplace. Some of the way's inspections can take place, either separately or in combination over a period, are:

- safety tours – general inspections of the workplace;
- safety sampling – systematic sampling of dangerous activities, processes or areas;
- safety surveys – general inspections of dangerous activities, processes or areas;
- incident/accident investigations– carried out after an accident causing a fatality, injury or near miss incidents which could have resulted in an injury or cause ill health. These situations must be reported to the safety employee representative given authority in your workplace.

## Practical example

An investigation involving the safety representative can give employees more confidence in the process. Employees are more likely to contribute to the investigation and provide resolution support. They may feel more comfortable speaking to a coworker who can relate to them so they will say what is on their mind. Representatives can play a very useful role in communicating effectively with you and your employees.

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### *Inspecting the workplace with representatives*

You and your representatives should plan a program of inspections in advance. Use your regular safety committee meeting as a forum to discuss timing and frequency so that all parties know and agree what inspections are happening, where and when.

- You should also agree on the number of representatives taking part in any one formal inspection. Bear in mind the nature of the inspection and circumstances in the workplace in order to judge what is suitable.
- It is important to plan inspections if there is more than one representative. They can then coordinate their inspections to avoid unnecessary duplication.
- It can help your relationship with the representatives if you conduct inspections together. It shows that you value their contribution and want to work together.
- If there is a safety officer or you have specialist advisors, they should be available to give technical advice on safety matters that come up during an inspection.

- For larger workplaces, it may not be practical to conduct a formal inspection of the entire workplace in a single session or for a complete inspection to be done by the same representatives. In those situations, consider doing inspections in more manageable units such as by department or facility. As part of a planned program of inspections, you may want to consider different groups of representatives conducting inspections in different parts of the workplace in order to meet deadlines.

## Following-up after an inspection

After an inspection:

- explain the reasons for any follow-up action you decide to take to your representatives;
- give the representative who notified you of the inspection the opportunity to inspect again so they can check to see if the issues raised got appropriate attention. Record their reviews; and share the follow-up action taken throughout the specific workplace inspected. Also, share the results and actions with the rest of your organization. This communication further supports your willingness to protect all employee's safety and health.
- There may be times when action may not be possible, you may not be able to act within a specified period. Explain the reason behind this to everyone. You remain responsible for making decisions about managing safety.

## GET IT RIGHT: KEEP IMPROVING

This section is about how to make sure your arrangements for workforce involvement is effective as possible and covers how you can keep improving by:

- monitoring performance;
- reviewing progress; and
- knowing what to do when things become challenging

Once you established communication and involvement of your employees and adjusted to the processes you have set in place, you should start thinking about how to keep improving over time. Realistically, there are likely to be some things that work well, others that could work better, and some things that need to be approached in a different way.

For effective employee involvement, you need to monitor performance and review progress regularly with your workforce and employee representatives. It allows you to continue improving the way you work together to enhance safety.

## MONITOR PERFORMANCE

To keep an eye on how involvement with your employees is working, you can:

- Check how supportive management staff have been by asking employees and their representatives if they have been encouraged to get involved and if they have been given time to participate.
- Check that employees know who their representatives are and whether they have been asked for their views about safety matters.
- Look into organizational arrangements for involving the workforce in

safety and whether they have changed to allow employees greater opportunity to be involved in communication.

- Collect information on safety issues and ideas for addressing issues that have been raised due to employee involvement to see if there have been improvements in how they are managed.
- Think about other measures beyond safety because involving your workforce in safety could result in additional benefits, for example in productivity, as things improve.

When you monitor performance, ask yourself if:

- what you find is acceptable or if you need to do something more;
- you need to address a matter further, how you will do this and what your employees think;
- are there any lessons to learn?

## Practical example

You will be doing well if you can show:

- employees are aware of their safety representative and they communicate with each other;
- there is managerial support for training and meetings;
- a safety committee that deals with strategic matters balanced with everyday problems that are resolved as they happen;
- good communication with and through the workforce so that messages are delivered clearly and decisions are explained;
- competence is built through training and information sharing so new skills are learned prior to changes occurring;
- joint problem solving where employees participate as equals to resolve issues;
- joint inspections and monitoring of safety performance, risk control systems, and progress with plans.

## REVIEW PROGRESS

In addition to considering how well communicating with your workforce is going, check how far you have progressed and consider where there is room for improvement. The review checklist can help you assess how close you are to moving towards full employee involvement and joint problem solving.

The statements are essentially goals to aim for so you can consider whether your arrangements are helping you to achieve those objectives. Not everything on the list will apply to all organizations. There may be other factors not covered that are more relevant for you. Checklists are general guidelines to help you see how you are doing.

### Review checklist

- gain commitment and action from senior management to involve employees and their representatives about matters affecting their safety.
- fully involve employees and safety representatives in discussions about safety matters affecting them and encourage the workforce to generate ideas for safety initiatives.
- train managers, employees and safety representatives together in safety matters to enable shared understanding and greater co-operation.
- use a range of methods to communicate and involve employees to appropriately and effectively consider the needs of different groups of the workforce who are affected by safety measures.
- give safety representatives access to the facilities and training they reasonably need to perform their role.
- ensure the safety committee members are equal partners working together to address strategic matters impacting employee safety. Day-to-day operational matters are resolved in separate meetings.
- involve safety representatives in joint accident investigations, workplace inspections and risk assessments.
- explain the reasons behind management decisions so the workforce can understand how their views have been considered in making decisions about managing their safety.
- build on the success of workforce involvement in some issues by engaging employees in discussions of safety issues that can be more challenging.
- review progress with involving the workforce in safety and update the communication processes so they are current and effective.

## FURTHER INFORMATION

[OSHA Recommended Practices for Safety & Health Programs](#)

[Montana Department of Labor & Industry](#)

[Montana Safety Culture Act](#)

[Montana Workers Compensation Bureau - for state agencies](#)