



Health and Safety Excellence program

2025 Program manual

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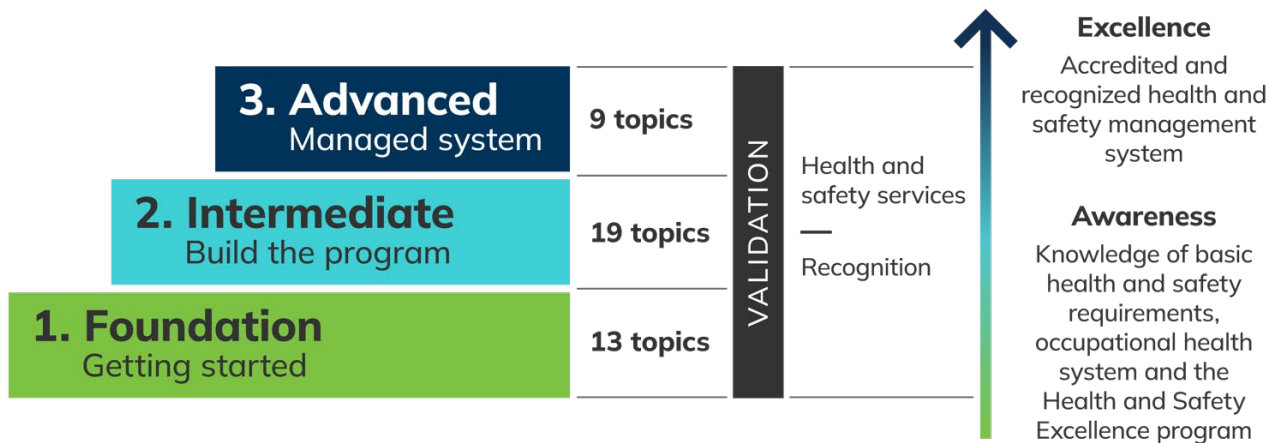
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Introduction

Thank you for joining the Health and Safety Excellence program. The program helps you make your workplace safer, while earning rebates on your WSIB premiums.

The program has three levels – foundation, intermediate and advanced. You can choose from 41 health and safety topics across the three levels.

Program levels



Program topics

Program levels and topics

Foundation

- Leadership and commitment
- Health and safety responsibilities
- Health and safety communication
- Health and safety participation
- Hazard identification
- Hazard reporting
- Workplace inspections
- Risk assessment
- Control of hazards (basics)
- Control of hazards
- Injury, illness and incident reporting
- Incident investigation and analysis
- First aid

Intermediate

- Competency
- Health and safety training
- Legal and other requirements
- Emergency prevention and preparedness
- Emergency response
- Psychological health and safety 1: assessing your risk
- Psychological health and safety 2: reducing your risk
- Return-to-work program requirements, forms and tools
- Health and safety accountabilities
- Return-to-work roles and responsibilities
- Accommodation and return to work
- Pre-use inspections
- Preventative maintenance
- Health and safety objectives
- Corrective action
- Control of documents
- Control of records
- Contractor management program
- Workplace health promotion

Advanced

- Monitoring, measurement and analysis
- Review health and safety trends
- Management review
- Health and safety continual improvement planning
- Internal audit
- External audit
- Change management and procurement
- Networking and peer learning
- Corporate social responsibility

Learn more about the topics and what you need to do to complete them on our website.

If you're a small business or new to health and safety, you can choose to complete sets of [pre-selected topics](#) designed to help you develop foundational health and safety policies and practices. Talk to your provider to learn more about this option.

Before you get started

How the program works

The program has four key steps: Join, Develop, Demonstrate and Achieve.

[Step 1: Join](#)

- register with an [approved program provider](#)
- read this manual
- complete your health and safety assessment on our digital tool
- complete the optional [health and safety survey](#)
- select health and safety topics for your action plan on our digital tool
- receive \$1,000 for creating an approved action plan

[Step 2: Develop](#)

- develop and implement your chosen action plan topics in your daily work activities

[Step 3: Demonstrate](#)

- show us how your topics have been implemented in your workplace
 - we recommend using the [evidence story template](#) to help you document the work you've done
- the WSIB will validate your topics to ensure they meet program requirements

[Step 4: Achieve](#)

- receive a rebate on your WSIB premiums (Schedule 1 only)
- receive an achievement report summarizing your work in the program
- earn badges for completing program levels

Roles and responsibilities

We're here to support you along with your provider. Here's how we work together.

The WSIB will:

- answer questions before and throughout your time in the program
- periodically check in to see how you're doing and gather feedback about your experience

- make sure you've fully implemented your topics in your workplace and determine whether you're eligible for a rebate
- suggest improvements or recommend topics (we'll often include your provider in conversations)
- troubleshoot technical issues with the digital tool (your provider can also help)

Contact information: healthandsafetyexcellence@wsib.on.ca

WSIB-approved Health and Safety Excellence program providers

Providers are health and safety professionals approved by the WSIB to deliver the Health and Safety Excellence program. They'll help identify where you can make the biggest impact, and provide additional tools, templates and services to be successful. They'll provide support in preparing for the [WSIB's validation](#) of your topic implementation. They are your experts when it comes to building your health and safety topic specific requirements. Provider fees cover the support, templates, and tools you will receive to effectively work through the program and earn your rebate. What you pay will be based on the topics you choose and the type of support you want.

Your business

One person may take on multiple roles in your health and safety journey depending on the size of your business.

Senior leaders will:

- need to understand the importance of health and safety
- be responsible for your business's success in the program
- provide the necessary guidance and resources to the person leading the development of your health and safety program

The person leading will implement the program into your business.

Responsibilities include:

- communicating with senior leaders
- planning and monitoring progress in the program
- managing risks, budget and program documentation
- making sure you can demonstrate that you've implemented your chosen topics

Employees will:

- be involved in the entire process of developing health and safety programs
- participate in training and be updated as things progress

- give feedback to ensure they understand the policies and procedures you've developed
- ensure the policies and procedures you develop are working as intended

There are rules that outline when a business requires certain health and safety roles. You can talk to your provider or [visit our website](#) to learn about these rules.

How much time does it take?

You have up to 12 months to complete your chosen topics and have your work verified by the WSIB. You may be eligible for a rebate on your WSIB premiums once we've confirmed your topics are complete.

The time it takes to complete a topic depends on the topic(s) you've selected and the resources available at your business. Your action plan will expire one year after it's approved – if you're worried that you won't complete your topics in the 12-month period, please talk to your provider.

Most providers recommend you use the ["Plan-Do-Check-Act" \(PDCA\) cycle](#) or the "Five steps to health and safety" (set a standard – communicate and train – evaluate – acknowledge success – make improvements) to help you implement your topics.

Step	Approximate time to complete
<p>Plan/Set a standard</p> <p>During this phase of the cycle, you'll create a written standard, like a policy, procedure, program, guideline, protocol, process, etc.</p>	one to three months
<p>Do/Communicate and train</p> <p>This step involves communicating, training and implementing your health and safety initiatives into everyday business operations</p>	one to three months
<p>Check/Evaluate</p> <p>You'll need to monitor your health and safety topic throughout implementation, then you'll do a formal evaluation in this step.</p> <p>You'll test if the topic is working the way you intended and identify whether you need to make any changes.</p>	three months
<p>Act/Acknowledge success and make improvements</p> <p>This phase of the cycle involves looking at the results of the "check" or "evaluation" in the last step. You'll create a plan to fill the gaps you identified and act on lessons you've learned.</p> <p>It also includes recognizing and acknowledging the input of employees who participated in implementing the topic</p>	one to three months

Step 1: Join

The first part of the Health and Safety Excellence program involves the following activities:

- setting up your profile in our online system (digital tool)
- completing a mandatory health and safety assessment
- having your employees complete an optional health and safety culture survey
- choosing topics for your health and safety action plan

Using the digital tool

You'll use the WSIB's online services digital tool to find program information and resources and submit your completed work.

Your provider will help guide you every step of the way.

Health and safety assessment

The program offers 41 topics across three levels: foundation, intermediate, advanced. You'll need to complete a health and safety assessment in the digital tool to help you select suitable topics.

You should complete the assessment with support from your business's senior leaders and those involved in health and safety in your workplace. It should take less than 15 minutes to complete, and if needed, you can save it and complete it over two or more sessions.

You must complete one assessment for **each** WSIB account registered in the program unless they share the same organizational ID. You can choose to complete one assessment and apply the results to all related accounts if you have multiple accounts under the [same organizational ID](#).

The assessment results will indicate a foundation, intermediate or advanced program level and a list of recommended topics for you to consider (look for the star beside the topic names).

Health and safety culture survey

An important part of an effective health and safety program is a strong workplace culture where health and safety are valued and embedded in day-to-day work.

Workplace culture is the shared practices, attitudes and perceptions that influence behaviour at work. Some people consider culture "the way we do things around here." Many factors affect workplace health and safety culture, including leadership priorities and values, management and supervision styles, work conditions and employee involvement.

In an organization with a positive health and safety culture, every business level – including senior leadership, supervisors, health and safety personnel, employees and customers – works together to prioritize health and safety. Research shows that leaders who value health and safety have safer, more productive and more engaged employees.

The culture survey is available online through the digital tool and lets you evaluate the current state of your health and safety culture through an anonymous 13-question survey.

Having employees complete this survey will help you:

- establish a baseline and measure change in your workplace culture over time
- help you measure your employees' understanding of the health and safety of your business
- engage and capture the voice of your employees on health and safety
- gather employee insights to help you decide which topics you may want to select

We recommend that you repeat the process annually to compare your results.

Where to find the survey

To share the survey with your employees you'll need to send them a link in an email. To get a link to the survey, [log in](#) to the digital tool.

Choosing topics and creating a health and safety action plan

The Health and Safety Excellence program helps you improve areas of your business where you don't have written health and safety standards (such as policies or procedures) in place.

You must choose topics that are [new initiatives](#) for your business to qualify for a rebate.

Choosing appropriate topics requires planning. You'll want to consider your current health and safety program and how you might build on it. Your health and safety assessment results from the digital tool will help, and you can look at your injury record that is available in your online services account. You can also review inspection reports, employee feedback, internal audits and other sources of information to understand where you can further develop your health and safety program.

You can complete up to five topics at a time, and you can choose topics from the different levels.

Checklist for selecting health and safety topics:

- review the topic description and requirements
- ensure it's a new topic for your business, which means that there's no approved, written standard in place
- discuss the selected topics with your provider
- submit topics in the digital tool for provider approval

You'll be required to confirm that the topics you've chosen are new to your business in the digital tool. If the topics aren't new to your business, they're ineligible for a rebate. You'll need to submit your topics to your provider so they can approve your topics and create an [action plan](#).

You cannot change your topics once your provider approves your health and safety action plan.

You can speak with your provider if you have questions.

What's considered a new topic?

Topics are considered new initiatives for your business if you:

- don't have a related [approved written standard](#) in place
- started to work on a topic but didn't complete the **planning** component of the Plan-Do-Check-Act model or five-step cycle before your action plan was approved. It's important to note that you must update and complete the full Plan-Do-Check-Act model or five-step cycle within the new action plan timelines. You'll need to show us this work when it's time for us to validate your topics.

You can't work on topics to improve existing policies or procedures in your workplace as this is considered continuous improvement and doesn't qualify for rebates.

Planning is considered complete once you have approved a written standard, regardless of whether you've communicated and trained employees.

Examples of new topics

1. A business doesn't have a health and safety policy and health and safety responsibilities haven't been established for senior management. They'll select the "leadership and commitment" topic.

2. An established business with an existing health and safety program doesn't have a process for managing contractors. They'll select the "contractor management program" topic.
3. A small business has informally completed workplace inspections but hasn't created a written policy, procedure or standard. The business has enrolled in the Health and Safety Excellence program and will select the "workplace inspections" topic.
4. A business previously drafted an injury, illness and incident reporting policy, but it was never approved. Subsequently, the business enrolled in the Health and Safety Excellence program and selected the "injury, illness, and incident reporting" topic to resume and complete the work.

Control of hazards topic

You may select the control of hazards topic multiple times, as long as you're addressing a hazard that [hasn't been controlled](#) and you are implementing new control measures. Your provider will work with you to help identify the specific hazard(s) to control if you want to select the control of hazards topic.

Important things to know about this topic:

- you can't use this topic to control the same hazard in different ways
- you can't use this topic to document controls that you already have in place
- you must apply the control measures you develop in the topic to all areas of your business where the hazard is present

Incomplete or deferred topics

You can re-select previously deferred or incomplete topics from a previous action plan if it was a new topic for your business when you first chose it. Speak to your program provider to learn more about previously deferred or incomplete topics.

It's important to note that you must update and complete the full Plan-Do-Check-Act model or five-step cycle within the new action plan timelines. You must present this update in your evidence story and supporting materials.

Consider the following when selecting your topics:

- What hazards are causing your employees to become injured or ill?
- Are you meeting legislative compliance requirements?
- Have you received any compliance assistance or orders from the Ministry of Labour, Immigration, Training and Skills Development?

What's considered continuous improvement?

Continuous improvement is the ongoing effort to review and improve existing health and safety policies and procedures. While continuous improvement is necessary to maintain a functional health and safety management system, **this work doesn't qualify for a rebate and you can't choose topics to update existing health and safety policy or procedures.**

Examples of continuous improvement

- updating any previously implemented health and safety initiative, element or topic
- updating existing programming to maintain regulatory compliance
- incorporating emerging best practices that have gained recognition and acceptance within a specific field or industry
- making changes to existing programs to incorporate requirements from the Health and Safety Excellence program topic requirements, employee feedback, technological improvements and new forms or insights gained from incident investigations and audits
- selecting the control of hazards topic to improve existing controls already in place

Are you a small business or a business new to health and safety?

If you're a small business or new to health and safety, you can choose to complete sets of pre-selected topics as part of an optional pathway designed to help you scale your health and safety knowledge and introduce you to foundational health and safety policies and practices. You can speak with your provider to see if the pathway or some of the pre-selected topics make sense for your business.

Recommended pathway

Year or Action Plan Cycle	Recommended topics
1	<ul style="list-style-type: none">• Leadership and commitment• Health and safety responsibilities• Health and safety participation
2	<ul style="list-style-type: none">• Injury, illness and incident reporting• First aid• Health and safety communication
3	<ul style="list-style-type: none">• Hazard identification• Risk assessment• Hazard reporting

Year or Action Plan Cycle	Recommended topics
4	<ul style="list-style-type: none"> • Workplace inspections • Incident and investigation analysis • Control of hazards (basics) • Control of hazard
5	<ul style="list-style-type: none"> • Accommodation and return to work plans • Return to work program (requirements, tools and forms) • Return to work roles and responsibilities

Are you COR® 2020, CSA Z1000:14, or ISO 45001:2018 certified?

If you have achieved these or any other health and safety certifications, there may be topics that you can work on within the Health and Safety Excellence program if they are new to your business. **Talk to your provider about these topic options:**

- Accommodation and return-to-work plans
- Control of hazards
- Corporate social responsibility
- External audit
- Internal audit
- Networking and peer learning
- Psychological health and safety 1: assessing your risk
- Psychological health and safety 2: reducing your risk
- Return-to-work program requirements, forms, and tools
- Return-to-work roles and responsibilities
- Workplace health promotion

Do you have multiple WSIB accounts under the same organizational ID?

If your organization shares the same organizational ID across multiple WSIB accounts, you may choose to join the program under a primary account and include all related accounts. This is also known as a “parent-child relationship.”

In these cases, the primary WSIB account (the “parent”) applies one action plan across the related accounts with the same organizational ID that choose to participate in the same action plan. This may make sense if the work and the health and safety hazards are the same across all accounts. Speak to your program provider if this applies to your business.

Important things to know:

Action plans:

- There will be one action plan for all accounts; all topics selected for the action plan must be new to all accounts participating in the action plan
- All accounts work on the same topics
- Secondary accounts can only view the approved plan and will not be able to add to or edit it

Evidence:

- Only the primary account can upload evidence to be used in validation
- The upload limit for evidence is based on one action plan
- Evidence must represent all accounts

Topic validation:

- Results apply to all accounts

Rebates:

- Rebates are calculated based on combined premiums of all accounts
- The maximum rebate for all accounts combined is \$50,000 per completed topic
- Rebates will be paid to the primary account
- All accounts participating in the program are eligible to receive \$1,000 per approved action plan. The WSIB will decide who will receive the \$1,000 on a case-by-case basis
- Compliance checks (e.g., WSIA charges, fatalities) apply to all accounts. If any of the accounts participating in the action plan is found non-compliant, no rebate will be issued

Receiving your digital member badge

More than ever, job seekers, employees and customers want to ensure the companies they do business with are healthy and safe.

You're eligible to receive your member badge once you join the program and your first action plan is approved. You can also see your member badge on the WSIB's [Safety Check](#), where job seekers and consumers can find information about businesses' health and safety data.

Through the program, you can earn badges to showcase your organization's commitment to health and safety. You can use and display your badges in several ways. Check out our [Terms of Use](#) for more information.

Consider using your badges on your business's website, email and/or letterhead. You can also print the badge and display it in your storefront or other spots that would help you showcase your commitment to health and safety.

Eligibility criteria for member badge

- be a Schedule 1 business with at least one employee or a Schedule 2 business registered in the program
- have an **approved** action plan

You'll be able to download your member badge from the digital tool once your provider has approved your action plan.

When we're determining whether your business is eligible for a rebate or a badge, the severity and frequency of any non-compliance issues may influence this decision.

Step 2: Develop

Now that you've selected your Health and Safety Excellence program topics and created an action plan, it's time to develop and implement them so they're a part of your business's everyday activities.

Developing a topic means implementing the new process or initiative in your business. Your topic is considered fully developed and implemented when it becomes an integrated part of your everyday business operations.

Developing a health and safety topic

Your provider will help you as you develop your topics and will be there to support you.

You'll need to choose an implementation model to help you develop your topic and make sure it becomes a part of your business's everyday processes. Your provider will help you choose an implementation model based on which model will meet your business's needs.

Here's an outline of what happens during each part of the most frequently used implementation model, the Plan-Do-Check-Act (PDCA) cycle.

Plan

The first step in implementing a health and safety topic is planning (or setting the standard) for what needs to be done to integrate the topic into your everyday business operations.

There are two main activities in this phase:

1. creating a plan
2. creating a written standard that's specific to the topic

Creating a plan

- When creating your plan, you may want to do think about:
- your business's expectations and commitments regarding health and safety standards and what you want to achieve.
- assigning responsibilities to team members detailing who will oversee various aspects of the implementation.
- establishing a clear goal that communicates why this initiative is essential—for example, reducing incidents and enhancing workplace well-being.
- outlining a list of actionable steps on how you want to implement what you develop (your written standard)
- ensuring you are aligned with relevant legislation, legal requirements, and industry codes
- identifying who will be affected by the implementation and how (e.g., employees, contractors, and customers/visitors, etc.)
- setting a timeline for these changes and identifying the specific locations, sites, or business lines that will be impacted in a project plan



Developing a written standard

You must create a written standard that is signed, dated, and [approved](#) to meet the specific requirements of each topic. You're required to provide us with a copy of the standard you create when it's time to [show us your work](#).

Refer to the topic requirements and use it as a checklist when you develop your written standard to make sure you meet all topic expectations.

Do

After your business has approved a written standard and any related documents, it's time to act. This step involves communicating, training and embedding your health and safety initiatives into everyday business operations. In most cases, everyone in the workplace will need specific

training on the topic. Be sure to check with your provider about what training your people will need.

This step will also require you to “do” what your new standard says you’ll do, e.g., implement hazard controls, keep records of your actions, ensure procedures are followed, etc.

For communication, consider the following:

- determine who needs to know what, when, how often and how information will be shared
- make communication two-way – always ask for feedback or ideas from employees
- repeat key information in a variety of ways
- encourage employees to ask questions or to repeat something if they do not understand
- communicate with employees during all parts of the cycle



For training, consider the following:

- everyone needs training, including the owner and senior managers
- vary your training methods and include real-life case studies and opportunities to practice what is learned
- keep attendance and training records, meeting notes, sign-off sheets and certificates
- train supervisors first so they can play a coaching role and hold employees accountable
- don’t cram training for high-risk hazards with other training

Communication and training are not the same. Communication involves telling your team about the changes that are being made, when they can expect training, and what the results of the work are expected to be. Training involves learning new skills and knowledge.

Check

The overall purpose of this step is to answer the following questions: Did you do what you set out to do, and is it working?

You'll need to monitor how you're doing along the way, but you'll perform a formal, documented evaluation in this step. This step is done after a sufficient time has passed after the "do (communicate and train)" step. Generally, we suggest three months.

The evaluation needs to include what was done, when it was done and how you'll address any gaps.

Consider the following:

- use an evaluation template/checklist and involve your joint health and safety committee members and management in reviewing and analyzing topics
- ask supervisors to keep logbooks to record good practices and those needing improvement
- observe a process or task to see if it's completed according to the standard
- review forms for content and completion in a timely manner
- use interviews, questionnaires and surveys with employees and analyze the results
- Note: quizzes/tests completed directly after training are a test of knowledge retention of the training only. Using this form of evaluation requires that time passes after the "do (communicate and train)" step, then tests/quizzes can be completed again
- ask someone outside your department or a third party to review work processes and give feedback



Act

This step involves reviewing the results of the "check" or "evaluation" you performed in the last step.

You can achieve this by creating an improvement plan to fill the gaps you identified and act on any lessons you've learned. In the future, you'll want to routinely evaluate and improve based on observations, feedback and analysis.

While implementing all items on your improvement plan is ideal, you'll have to show that at least one fix has been completed when you submit your evidence to us.

This step also includes recognizing all employees who helped to implement the topic and acknowledging their input. Employees need to know you value their contributions to ensure the continued success of your health and safety program.



Consider the following:

- acknowledge employees for healthy and safe behaviour or supporting others to do so, either informally or during performance reviews
- send a letter from the owner/senior management to congratulate all employees on their contributions to health and safety
- highlight successes in the company newsletter or website

Tip: it's important to maintain the topics you've already completed to ensure your health and safety program remains current and effective. Although not required, we recommend that you continually re-assess previously completed topics using the implementation model you selected.

Collecting evidence

You'll need to gather proof that you implemented your topic when it comes time to show us your work. As you implement your chosen topics, you should:

- keep track of your activities and work to implement a topic and meet program requirements
- keep a copy of a written standard developed to support your chosen topic(s)
- collect materials like photos, videos and documents that help show how you implemented the topic into your business.

We recommend you start collecting your proof **when you start implementing your topic**. This approach allows you to capture the details as you go, so you don't have to worry about trying to remember everything months after the work is done. This will help when it comes time to show us your work.

Step 3: Demonstrate

You've implemented your topic(s), and now it's time to showcase your work through the WSIB's validation process.

The validation process

There are two phases in the validation process:

- Telling us how you implemented your chosen topic, and uploading proof (evidence) into the digital tool
- WSIB validation

We've designed the validation process to be a positive experience. It's an opportunity for you to receive feedback on your work, insights on best practices and recommendations for ongoing improvement from the WSIB's health and safety experts (known as validators).

Tip: Our validation process helps you make sure the topics you've chosen are fully implemented in your workplace. It's your business's responsibility to make sure you meet the terms of the *Occupational Health and Safety Act*, regulations or other applicable legislation.

Creating and uploading evidence

You'll need to show the WSIB your work so it can be verified. You'll need to upload proof in the digital tool, including:

- a copy of the signed, **written standard** created for each topic
- a summary that describes how you developed and implemented the topic in your workplace, covering all locations if applicable.
- **supporting materials** such as meeting minutes, videos or records that reflect the topic's implementation at a minimum of 20 per cent of your locations (if covering multiple sites)

Writing your summary (evidence story)

Begin your story by providing general background information on your company—what your business does or produces, the organizational structure, the number of work sites or locations, the number of employees, etc. Then describe the steps you took to plan and develop your topic.

Tip: use [our simple template](#) to help you create your evidence story. Review the [examples](#) to get an idea of what an ideal submission looks like.

Supporting materials

You'll need to submit supporting materials to help show us your work. This will help confirm you fully implemented the topic.

Your supporting materials should demonstrate how the topic is implemented in your workplace. For example, if you created a lockout procedure, consider including a video of someone performing a lockout or submitting the procedure. You can include up to five files (50 MB each) of supporting materials per topic.

Consider different formats (e.g., documents, images, videos, etc.) when selecting or creating your supporting materials. It's best to provide clear, direct materials and avoid long, detailed materials like your company's health and safety manual or extensive records. Your provider will help you. **At a minimum, please submit all related policies and procedures.**

Each supporting material file should include:

- the name and title of the person who created the evidence and those featured in it (e.g., video recording)
- the date the evidence was created

Tip: you don't need to upload all your evidence packages at the same time. You can upload your evidence story and supporting material files as you develop topics. However, we need to receive evidence for all topics before your action plan expiry date to qualify for a rebate and a level badge, if applicable.

The digital tool accepts files in the following formats: .doc, .docx, .flv, .gif, .jpg, .jpeg, .mov, .mp3, .mp4, .pdf, .png, .ppt, .pptx, .txt, .xls and .xlsx.

Submit your evidence for provider review

You need to upload and save your evidence to the digital tool and submit it to your provider for review. You can't update your submission after you have sent it to your provider.

WSIB validation

Validators check if you've met the topic requirements and implemented the topic using the Plan-Do-Check-Act or the five-step implementation model. We typically complete topic validation within two weeks. This timeframe may vary depending on the amount of information in your evidence package.

Please keep your contact information up to date in the digital tool so we can reach you.

Online validation

A WSIB validator will review your evidence, and they may contact you with questions or provide you with an opportunity to explain further.

Tip: one or more of your topics may be selected for an onsite validation. We recommend that you plan as though all your topic(s) will be selected for onsite validation.

Onsite validation

Some members will receive onsite validation at their workplace in addition to online validation.

Onsite validation gives you free access to a health and safety expert who shares their expertise and best practices for improving your health and safety program. It's also an opportunity to ask questions and discuss any additional feedback. Members who have experienced an onsite validation have told us that it was a positive and beneficial experience that helped them strengthen their health and safety program.

Onsite validation builds on the online validation results by helping to confirm that a topic is implemented in your workplace. It is not an audit of your entire health and safety program—it's a more detailed review of completed topics in your current action plan.

If you're selected for onsite validation:

- you'll receive notice within 15 business days once the online validation is complete for **all** action plan topics
- we'll work with you to arrange an appropriate time for the visit on a day that is convenient for you
- you need to participate to remain eligible for rebates and level badges

The validator determines the topics and work sites they will review, and you'll need to provide access to them. Typically, onsite validation of a single location will require two to four hours. The validator may gather and record evidence in many ways, including:

- touring your workplace
- reviewing documents and records
- interviewing employees
- observing job tasks

We recommend preparing in advance by gathering your supporting materials and ensuring your employees know the validator may want to talk with them. We also recommend connecting with your provider, who may offer additional support in preparing for the onsite validation.

If the validator determines that you have not fully implemented one or more of your topics during an onsite validation, either of the following will happen:

- If you were given 60 calendar days to address gaps for the topic at online validation, the topic would now be deemed incomplete. The topic status in the digital tool will change from **Complete** to **Incomplete**, and it will not qualify for a rebate.
- If the validator previously deemed the topic complete during the online validation, you'll have 60 calendar days from the date of the onsite validation to provide additional evidence through the digital tool. The 60 days includes the time it takes your provider to review your evidence before submitting it to the WSIB. The topic status in the digital tool will change from **Complete** to **Draft**.

Your topic(s) will also be incomplete if you decide not to participate in your onsite validation.

Results status

You and your provider will be able to view the results of the online validation in the digital tool.

Here's what each status means:

Complete

The results of our review confirm that you have met the topic requirements and have implemented it in your business.

A topic could also be marked complete without an online validation. If this happens, the validator will give you written confirmation that they did not review your topic.

Note that topics may be selected for onsite validation, including those that did not go through online validation.

Additional evidence required (AER)

Based on the validation, it's not clear that you've met the topic requirements or that you've implemented the topic in your workplace. The validator will provide feedback on the gaps they've identified, so you can revise your evidence by uploading additional supporting documentation on the digital tool.

You must submit additional evidence within 60 calendar days of the notice. You need to ensure that your provider has enough time to review your new evidence before this date. The deadline for your provider to upload your additional evidence will be displayed beside the topic name.

The topic's status will change from **In progress** back to **Draft** on your digital tool dashboard.

Incomplete

A topic could be found incomplete for one of four reasons:

1. The WSIB validator decided that a topic was not implemented in the workplace.

2. Additional evidence for a topic that was validated as "additional evidence required" was not submitted within the required 60 days.
3. Nothing was submitted to the WSIB for validation before the action plan expiry date.
4. The topic was not new to the business or was considered as repeated or [continuous improvement work](#).

Topics marked incomplete are ineligible for rebates.

Action plan status changes

Pending closure

Your action plan status will change from **In progress** to **Pending closure** when either of the following happens:

- all the topics in your action plan have been validated or deferred
- your action plan expiration date has passed, and we are still validating one or more topics

The action plan status will stay in **Pending closure** while you wait to be notified whether we will select any of your topics for an onsite validation. If we do not select any of your topics for onsite validation, the action plan status will change to **Closed**.

Your validation results will be considered final once your action plan status changes to Closed on your digital tool dashboard. When your action plan is closed, all your topics with a Complete status are eligible for a rebate.

Action plan expiry

Your health and safety action plan expires 12 months from the day your provider approves your action plan. Your topics will be considered **incomplete** if you don't submit evidence for your topics by the expiry date.

Deferring a topic

Talk to your provider about whether the deferral option is right for you. Reasons to consider this are:

- you have not started or finished a topic in your action plan, and you don't have time to implement and submit your evidence before your action plan expires

- the WSIB validator has returned a topic as additional evidence is required, but you can't address the recommendations within 60 calendar days

It is important to note you're not eligible for a rebate for topics you choose to defer.

Reconsideration of validation results

You'll receive an achievement report on the digital tool shortly after your action plan is closed. You can submit a request for us to reconsider your validation results within 30 days of receiving your achievement report. You'll receive a notification in the digital tool once your achievement report is available.

To request a reconsideration, click the link at the bottom of the achievement report. The achievement report will also display the deadline for completing your reconsideration request. Once we've reviewed your submission again, you'll find an update in the comment section on the action plan page in the digital tool.

Step 4: Achieve

Congratulations! You're on your way to building a sustainable health and safety program. Be proud of your work to prevent injuries and illnesses—it's time to celebrate and reflect on the positive change within your workplace. Consider sharing your success in a company newsletter or hosting an all-staff meeting to discuss your accomplishments and goals for moving forward.

Achievement reports

You'll receive an account-specific achievement report once all your topics have final validation status and the WSIB has completed an eligibility review. This report will outline your accomplishments, including validation results and rebates you've earned. Consider sharing your achievement report with your employees to acknowledge their success and participation in the program.

Rebates

The amount you earn in rebates is based on the number of topics you complete and your reported WSIB premiums for the previous year.¹ Plus, you can receive an extra \$1,000 every time you create a new, **approved** health and safety action plan.

The date you receive your rebate will depend on when your action plan closes. Speak to your program provider for rebate payment dates.

¹ NOTE: Depending on the time of rebate, it may be based on reported premiums for two years prior.

We issue rebates and the \$1,000 incentive by cheque unless you have a balance owing to the WSIB, in which case your rebate will be applied to your WSIB account first. You'll be able to see any issued rebates on your WSIB account statement.

The WSIB reserves the right to withhold, reverse or adjust any rebate for any reason it sees fit.

To be eligible for a rebate, your business will need to meet the following eligibility criteria:

- has an active WSIB account in good standing
- is a Schedule 1 business and you pay premiums based on your insurable earnings (Schedule 2 businesses cannot receive rebates because they do not pay WSIB premiums)
- has one or more action plan topics validated as “complete”
- has no Workplace Safety and Insurance Act violations
 - a member charged under the act must wait two years (Limitations Act of Ontario) from the date of the charge to the date of the compliance check before they are eligible for a rebate
- has no allowed traumatic fatality claims from the date your action plan was approved to the date the rebate is issued
 - if a business is waiting on a decision regarding a workplace fatality claim, they're not eligible for a rebate until a decision about that fatality is made.

Level badges

The positive changes you make in your workplace through the Health and Safety Excellence program can help strengthen your reputation. That's why we've created program badges that you can use to showcase your commitment to health and safety to your customers, employees and community. As you progress through the program, your achievements will be rewarded with level badges when you **complete all topics** within a program level. The level options are foundations, intermediate and advanced.

Eligibility criteria for level badges:

- be a Schedule 1 or Schedule 2 business registered in the program
- comply with the Workplace Safety and Insurance Act
- have no allowed traumatic fatality claims from the date your action plan was approved to the date the badge is issued
- complete all topics within the level
- if a business is waiting on a decision regarding a workplace fatality claim, they're not eligible for a badge until a decision about that fatality is made
- once a member earns a level badge, their future action plans can't include a foundation-level topic, except for repeating the Control of Hazards topic

You can download your badges from the Badges Earned table on the digital tool.

Next steps – continuing in the program

Preparing your next action plan

The digital tool lets you track topics you might want to select for future action plans through the **Future Action Plan** page. You can use this feature while your current action plan status is **In progress** and is available until the action plan is closed.

Tip: you can start working on new topics by creating a new action plan as soon as your current action plan is closed.

Continuing your journey: Supporting Ontario's Safe Employers program

Members who complete all 41 topics in the Health and Safety Excellence program can apply for provincial accreditation and recognition through the [Supporting Ontario's Safe Employers \(SOSE\)](#) program.

Note: businesses that have applied for or been recognized by the Chief Prevention Officer through the Supporting Ontario's Safe Employers Program aren't eligible to participate in or receive rebates from the Health and Safety Excellence program.

Members will be disenrolled from the Health and Safety Excellence program once they apply for the Supporting Ontario's Safe Employers Program.

You should contact your provider or email us at healthandsafetyexcellence@wsib.on.ca if you've applied for or are interested in applying for the Supporting Ontario's Safe Employers Program.

Additional resources to support you

Resource	Where to find it	When to use
Online services	Access through your online services account	Access rate and claim information and your Workplace Injury Summary report to identify areas where you may need to focus, what your claims history looks like and how you compare to your peers.
Topic requirements	Find all the topic requirements on our website	The topic requirements provide information needed to complete each topic.
Digital tool	Access through your online services account	Use our digital tool to manage your progress through the program. The digital tool is also home to reference documents and other useful resources. It's available 24/7 so you can access it from anywhere at any time.
Health and Safety Excellence program digital tool guide	Under resources section in the digital tool	Use this guide to help you navigate the digital tool at each step of the program.

Glossary of terms

Account number

A Workplace Safety and Insurance Board (WSIB) account number is the unique seven-digit number assigned to your business when you register with the WSIB.

Action plan

The topics a member selects for their program cycle.

Action plan status

After creating an action plan, you'll see its status on the digital tool's dashboard.

Here are the possible statuses:

Action plan status	Description
Draft	You have created the action plan but have not yet submitted it to the provider for review.
Draft expired	You created the action plan but either you did not submit it, or your provider did not approve it within 90 days of the creation date.
Ready for provider review	You have submitted the action plan to the provider for review.
Approved	The provider has approved the action plan. You're developing your topics but haven't submitted any to the WSIB for validation.
In progress	You have submitted at least one topic to the WSIB for validation, or you have deferred or one or more topics.
Closed – inactive	The action plan has expired, and you did not defer or submit any of the topics to the WSIB for validation. As a result, the system automatically marks each topic as "incomplete." No further action is allowed, and the action plan is closed and available for viewing only.
Pending closure	There are three situations in which you may have a Pending closure: <ul style="list-style-type: none">• all topics have received final online validation results and you're waiting to find out if you'll receive an onsite validation• you've had an onsite validation and you're waiting for the results• your action plan is expired and you're waiting for one or more topics to be validated.
Closed	You submitted at least one topic for WSIB validation or deferred one or more topics. The action plan is closed and available for viewing only after receiving final validation results for all approved topics.

Approved standard

An approved standard is any written standard that has been signed by the highest level of management at the workplace, thus indicating employer and senior level management commitment. See "[written standard](#)."

Digital tool

An online platform for members, providers and WSIB employees to administer the Health and Safety Excellence program.

Evidence story

A detailed description of a member's activities and actions to develop and implement a topic in the workplace and their journey to meet the topic requirements.

Evidence supporting materials

Current relevant materials that support and align with the topic evidence story. This can include various formats such as documents (policies, safe operating procedures, etc.), records (training, pre-use inspections, minutes of meetings, signoffs, etc.), videos, pictures and audio recordings.

Evidence package

The combination of a member's evidence story and evidence supporting materials. Each topic in an action plan needs one evidence package.

Five steps to managing a health and safety model

An implementation model to help address health and safety issues by breaking down all activities into five smaller, actionable steps.

Hazard

Anything (e.g., chemicals, moving vehicles, etc.) that can hurt people (injury), make them sick (illness) or cause property damage.

Hazard control program

A written program documenting all steps necessary to protect people from exposure to a hazard and avoid injury, illness and incidents. It identifies the training, safe work practices and implemented controls while describing how to monitor the program for effectiveness.

Level

Program topics are divided into three levels: foundation, intermediate and advanced. Members choose their topics based on how advanced their business's health and safety program and practices are.

Member

A business registered in the Health and Safety Excellence program.

Mental health

A state of emotional, psychological and social wellbeing where every individual realizes their own potential, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to their community.²

Organizational identification number (Org ID)

The unique number given to an organization registered with the WSIB and has one or more account numbers. An organization can have multiple accounts under one Org ID depending on the number of branches/locations/business numbers, etc.

Plan-Do-Check-Act (PDCA) model

An implementation model to help address health and safety issues and develop and implement topics by breaking **down all activities into smaller, actionable steps**.

Program provider

WSIB-approved health and safety professionals who deliver the Health and Safety Excellence program. Providers guide and support members throughout the program.

Psychological health

See Mental health

Psychologically healthy and safe workplace

A workplace that promotes employees' psychological well-being and actively works to prevent harm to employee psychological health due to negligent, reckless, or intentional actions.³

Psychological health and safety

Deals with the risk of injury to psychological well-being. Improving psychological safety in a work setting involves taking precautions to prevent injury or danger to employee psychological health that is within the influence and responsibility of an employer.⁴

Psychological (mental) illness

Characterized by alterations in thinking, mood or behaviour associated with significant distress and impaired functioning.⁵

Psychological injury

Harm to mental health from an event or series of events that can significantly impair a person's ability to function at work or at home.⁶

² World Health Organization (modified)

³ CSA Standard Z1003-13

⁴ [Workplace strategies for mental health](#)

⁵ Public Health Agency of Canada

⁶ Guarding Minds at Work (modified)

Psychosocial factors

Work conditions (social, cultural, environmental or organizational) that can have either a positive or a negative effect on employee psychological health and safety.

A full description of each psychosocial factor included in the National Standard is available through the [Mental Health - Psychosocial Risk Factors in the Workplace](#).

Psychosocial hazard

Psychosocial factors that are potentially harmful to psychological health and safety (e.g., interpersonal conflict, heavy workload, lack of clear leadership).

Recommended pathway

Sets of pre-selected topics that help guide small businesses or businesses that are new to health and safety to scale their health and safety knowledge and introduce them to foundational health and safety policies and practices. The pathway is optional.

Schedule type

There are two types of businesses insured by the WSIB: Schedule 1 and Schedule 2.

- **Schedule 1**

Businesses pay premiums in exchange for workplace insurance. Those premiums are added to a pool that provides compensation for people with work-related injuries or illnesses.

- **Schedule 2**

Businesses pay the direct costs of benefits for their claims. These businesses are usually very large companies that are either publicly funded, self-funded but legislated by the province, or federally regulated industries like airline, shipping, railways and telephone companies.

Scoping

Implementing health and safety topics into less than 100 per cent of a business (e.g., specific locations or product lines). Scoping applies to an entire action plan, not individual topics.

Topic

A program topic is based on best practices, outlining what is required to manage a specific health and safety hazard, process or initiative. Topics are the building blocks of a strong health and safety management system. The Health and Safety Excellence program offers 41 topics across three levels (Foundation, Intermediate, Advanced). Each topic allows you to focus on the health and safety issues that matter most to your business. Members are eligible for a rebate when they successfully implement a topic.

Topic status

The status of topics in your current action plan changes based on your activities in the program. You'll see each topic's status beside its name in your action plan. The table below shows different topic statuses and their descriptions.

Topic status	Description
Draft	You're working on writing your evidence story and gathering your supporting materials.
Ready for provider review	You've submitted the evidence package (evidence story and supporting materials) for your provider to review.
In progress	Your provider has submitted the topic to the WSIB for validation and it has been assigned to a validator.
Draft – Additional evidence required	The WSIB validator requires additional evidence to confirm that the topic has been applied in your workplace.
In progress – Additional evidence required	You've submitted additional evidence, and the topic is with the WSIB for validation.
Complete	The WSIB validator has decided that the topic has been implemented in your workplace, or the topic did not go through an online validation.
Incomplete	Can mean one of four things: <ul style="list-style-type: none">• The WSIB validator decided that a topic was not implemented in the workplace.• Additional evidence for a topic that was validated as "additional evidence required" was not submitted within the required 60 days.• Nothing was submitted to the WSIB for validation before the action plan expiry date.• The topic was not new to the business or was considered as repeated or continuous improvement work
Deferred	You've informed your provider that you won't complete the topic during your current action plan cycle.

Uncontrolled hazard

An uncontrolled hazard is a potential source of harm or danger that:

1. poses a risk of causing damage, injury, or loss, and
2. lacks preventive or protective controls to minimize its potential negative impact, and
3. does not have a related written standard.

Validation

The process that the WSIB uses to check if a topic has met the program requirements and is fully implemented in a workplace. The validation process may include online validation, onsite validation or both.

Written standard

A formalized document designed to establish clear expectations, efficiency, and ongoing compliance within a business. It could be a policy, procedure, program, guideline, protocol, process or written controls measures.

Work-related mental stress

The response people may experience when presented with work demands and pressures that are not matched to their work capacity, knowledge or abilities, and which challenge their ability to cope.⁷

Health and Safety Excellence program badges

Terms of use for member badges

About the terms of use for program badges

Please read these terms of use ("terms", "terms of use") carefully before displaying one or more of the Health and Safety Excellence program badges ("the badges"), which are property of the Health and Safety Excellence program, and the Workplace Safety and Insurance Board ("the WSIB").

Your access to and use of the badges is conditional on your acceptance of and compliance with these terms. These terms of use apply to anyone making use of the digital badges. **By using the badges, you agree to the following terms.**

Acceptable use of the badges

Eligibility for badges

As a member the Health and Safety Excellence program, you may be eligible for one or more badges throughout your involvement in the program.

Only the individual or organization linked to the participating business account may display that account's badges (described herein as "a business" or "your business"). To display a member or

⁷ World Health Organization (modified from definition of work-related stress)

level badge as a business, you have to either (1) have an approved action plan (“member badge”) or (2) complete all topics in a level (“level badge”).

Displaying the badges

You may display digital and print badges in spaces related to your business including, but not limited to, displaying badges in or on:

- email signatures
- websites
- printed materials related to your business

Print and digital badges should be placed on a white or solid-coloured background if possible. Avoid placing them on highly patterned or visually complex backgrounds.

Print badge

You must adhere to the minimum and maximum size limits when printing your badge. You will receive more details when you receive your annual badge. Contact us if you want to print your badge in a larger format.

You cannot print your badge on adhesive materials, such as bumper stickers and window decals.

Digital badge

Digital badges are intended for use on screen, including for email signatures and on web pages. You must adhere to the minimum and maximum size limits when using your digital badge. You will receive more details when you receive your annual badge.

Unacceptable use of the badges

Exceptions to use

The WSIB may ask that a member business not display digital or print badges for a period where:

- the business experiences a traumatic fatality or has a fatality pending decision, from the date their action plan was approved to the date the achievement report is posted
- any outstanding fees are owed to the Health and Safety Excellence program provider prior to receiving the badge
- a business has been found guilty of claims suppression
- outstanding balances are owing to the WSIB prior to receiving the badge
- a business has been charged or convicted at the time of recognition

- a business has failed to fully implement a topic into 100 per cent of the business; and
- a business is currently under investigation

The WSIB reserves the right to consider other compliance factors such as the severity and frequency of non-compliance issues to determine recognition eligibility.

If the WSIB directs that you may no longer display badges, you will immediately remove the badges from your website and any other materials or accounts related to your business, until the WSIB authorizes you to resume use of the badges.

Misuse of the badges

The badges are official marks owned by the WSIB. By using the badges, you agree not to:

- adopt, use, register or attempt to register anywhere in the world any logo or mark confusingly similar to the badges
- do or cause to be done any act or thing, directly or indirectly, contesting or in any way impairing the WSIB's right, title or interest in the badges
- alter the badges in any manner, including proportions, colours, elements, etc., or animate, morph or otherwise distort its perspective or two-dimensional appearance
- use the badges in a manner which displays it in a negative or disparaging manner
- use the badges as a feature or design element of any other logo or any other name or trademark; and
- isolate any element of the badges, including the WSIB logo, for use anywhere

Notwithstanding your satisfaction of and compliance with the foregoing, the WSIB reserves the right to withdraw its permission to use and display the badges at any time, at its sole discretion. If the WSIB exercises this right, upon request by the WSIB you will immediately remove the badges from your website, and any other materials or accounts related to your business.

Termination

We may terminate or suspend access to the badges immediately, without prior notice or liability, for any reason whatsoever, including if you breach any of the terms of use.

Changes to terms of use

The WSIB reserves the right to make changes to these terms from time to time. If the terms change, the WSIB will make a new copy of the terms available in the Health and Safety Excellence program digital tool resources page (as modified from time to time). The changes will become effective and will be deemed accepted by you seven (7) days after the posting of the notification if you continue to use the badges.

For more information

You may contact your program provider for more information.

Appendix: Evidence story template

This template will help you tell us how you implemented your selected topics. We recommend you complete the sections of this template as you progress through implementing your topic. It's easier to document the work as you're doing it, rather than trying to remember what was done later.

Please work with your provider to ensure you include all the necessary information and supporting materials in your submission(s).

Note: Your supporting evidence should show work you've completed, not reference work you plan to complete in the future. You can see examples of completed stories at the end of this document.

Getting started

Identify the topic you selected and provide a brief description of your business. Include details such as the number of employees, industry/business activity, number of locations, and who is involved in developing and maintaining your health and safety program.

Plan or Step 1 – Write the standard

Describe what you did to develop the written standard (e.g., policy, procedure, program) for your workplace.

You should include the following information:

- the overall goal you want to achieve by selecting this topic
- who developed (job title is fine) and reviewed the written standard to ensure it meets the topic requirements
- what the written standard is called
- who approved the written standard and when
- any additional information that would help us understand the steps you took to develop the written standard
- how leadership was involved
- company locations/branches and/or lines of business to which the written standard applies and describe how employees, contractors, etc. were considered when you developed the standard

Your proof (supporting evidence) to show us your work could include:

- a copy of the standard (this is required)
- dated meeting minutes and agendas
- project plans

Do or Step 2/3 – Communicate and train

Tell us what you did to implement the written standard (e.g., policy, procedure, program) into your business activities.

You should include the following information:

- how it was communicated – by whom, to whom, and when (please include dates) How you trained your employees or those impacted by the written standard (e.g., presentation, videos, safety meeting, toolbox talk, safety talk, online training, in-person training, orientation, etc.)
- where employees were trained and when (please include dates)
- any additional information that would help us understand the steps you took

Your proof could include things like:

- completed forms/documents used in training such as: workplace inspections, incident reports, and hazard reports
- emails, memos, or videos showing how you communicated the written standard to employees and how you delivered the information (e.g., newsletter, bulletin board post, intranet)
- training records (please date)
- any materials/documents used in training
- documentation that confirms employees understood the training information, results of assessment (e.g., tests, quizzes), certificates of completion, etc.
- evidence showing activities related to the topic are being completed in the workplace such as employees using new forms (e.g., completed hot work permits, preventative maintenance records), or photos or videos showing the written standard posted

Check or Step 4 – Evaluate the results

Tell us how you checked that what you did was working the way you intended.

You should include the following information:

- how you checked (evaluated) that your topic is being practiced/is understood – including when (please include dates) and who completed the evaluation
- you allowed sufficient time (generally 2 to 3 months) after you delivered training in your workplace before you did your evaluation.
- how you recorded your results and what results you found e.g., What is working well? What is not working well? What are people missing or confused about?
- any additional information that would help us understand the steps you took to evaluate

Your proof could include things like:

- any forms you used to check if the topic is working (e.g., surveys, interviews or quizzes to gauge employees' knowledge, inspections, audits or documented observations of if/when you physically saw the employees following the written standard including completion rates and quality of information completed on forms if applicable)
- results/findings/conclusions of your evaluation
- documentation showing a review was completed, what was found, and any areas that need fixing/attention
- data/evidence that the topic had a positive impact in the workplace
- a review of how the written standard meets all topic requirements
- documentation showing how you checked if the required forms were being completed

Act or Step 5 – Make improvements and acknowledge success

Tell us how you improved the written standard and addressed any problems that were found, and that you implemented the topic successfully.

You should include the following information:

- when (please include date) and how you addressed the problems identified by your evaluation
- who was responsible for fixing the problem/making the changes that were found and the date they were fixed
- how you recognized employees for their contribution (e.g., awards, awards, public recognition, celebratory events/team outings, etc.
- any additional information that would help us understand the steps you took to improve and acknowledge the success of the topic

Your proof could include things like:

- records such as action plans, work orders or emails showing how you addressed any problems
- any communication or documentation of celebration (e.g., photo of pizza party, acknowledgement emails from senior leaders)

Appendix: Evidence story examples for topics

The examples in this section might be helpful to you when you're preparing your evidence story for each of your topics. Example stories are provided in alphabetical order by topic.

Please note that these are only examples. Your story will be unique to your business. Consider using our evidence story template in the resource section of the digital tool to assist you as well.

Click on the links below find the topic you are working on or browse through the list.

[Accommodation and return-to-work plans](#)

[Change management and procurement](#)

[Competency](#)

[Contractor management program](#)

[Control of documents](#)

[Control of hazards \(basics\)](#)

[Control of hazards](#)

[Control of records](#)

[Corporate social responsibility](#)

[Corrective action](#)

[Emergency prevention and preparedness](#)

[Emergency response](#)

[External audit](#)

[First aid](#)

[Hazard identification](#)

[Hazard reporting](#)

[Injury, illness and incident reporting](#)

[Incident investigation and analysis](#)

[Internal audit](#)

[Health and safety accountabilities](#)

[Health and safety communication](#)

[Health and safety continual improvement planning](#)

[Health and safety responsibilities](#)

[Health and safety objectives](#)

[Health and safety participation](#)

[Health and safety training](#)

[Leadership and commitment](#)

[Legal and other requirements](#)

[Management review](#)

[Monitoring, measurement and analysis](#)

[Networking and peer learning](#)

[Pre-use inspections](#)

[Preventive maintenance](#)

[Psychological health and safety 1 – assessing your risk](#)

[Psychological health and safety 2 – reducing your risk](#)

[Return-to-work program requirements, forms and tools](#)

[Return-to-work roles and responsibilities](#)

[Review health and safety trends](#)

[Risk assessment](#)

[Workplace health promotion](#)

[Workplace inspections](#)

Accommodation and return-to-work plans

Plan / Set the standard

- We wanted a program that supports our employees and helps them return to work following an injury or illness.
- By facilitating an early, safe and suitable return to work, we are also meeting our legal responsibilities as set out in the following legislation governing workplaces: the [Ontario Human Rights Code](#) (s.13), the [Workplace Safety and Insurance Act](#) (s.40,41), the [Accessibility for Ontarians with Disabilities Act](#) (s.7) and the [Occupational Health and Safety Act](#), (s.25).
- The first step was for our health and safety manager to draft a return-to-work accommodations policy. All employees were provided an opportunity to give feedback and ask questions about the draft policy. After incorporating the suggestions into a final draft, our CEO reviewed and approved the policy on March 30, 2020.

- We had a third-party ergonomist come in and review all jobs to help identify each position's physical and cognitive demands. We built an inventory of modified work options for typical injuries for the medical professionals.
- We created sample letter templates that are used in the event of a workplace injury. A package with these documents is kept in the first aid room for easy access. A similar package was developed for non-work-related injuries/illnesses.
- We included a requirement in the policy for weekly meetings between the employee and the supervisor.

Do / Communicate and train

- We shared the policies, procedures and documentation templates related to Accommodation and return to work with all staff during a meeting on April 5, 2020. Individual assessments made by the ergonomists were added to a specific section of our health and safety binder for easy access.
- All employees attended in-person training led by a senior manager and delivered through a PowerPoint presentation from July 8-20, 2020. Attendance was taken to ensure everyone was trained. Additional training was implemented via morning coffee talks, during meetings, and our Joint Health and Safety Committee meetings.

Check / Evaluate

- We tested the process using a mock lost-time injury scenario so we could work out any issues before releasing the policy and procedures for training purposes.
- On November 18, 2020, we reviewed return-to-work plans, outcomes, and usage. A review of our program was also done at quarterly Joint Health and Safety Committee and management meetings.
- We noted that all employees and supervisors were using the correct forms, except in one case where the weekly log was not being used. We also identified a gap for mental stress injuries.

Act / Acknowledge success and/or make improvements

- Following our evaluation, we added further information about mental stress injuries and accommodations. On December 19, 2020, we sent out company-wide memos thanking all employees for training and developing our Return-to-work program.

Change management and procurement

Plan / Set a standard

- Our goal in selecting this topic was to ensure our change management and procurement processes were designed with a health and safety focus. Specifically, we wanted to:

- Include health and safety requirements in our purchasing specifications
 - Ensure any significant change related to our business operations includes robust hazard recognition, risk assessment and control procedure
- When implementing new policies, the health and safety department involves a group of employees whenever possible. We created a working group comprised of our senior management, our Joint Health and Safety Committee, and our procurement manager.
- We created a health and safety component within our change management and procurement policies. We set rules for conducting hazard/risk assessments and control procedures whenever a change, new equipment, tool, or work operation is initiated.
- We also changed our procurement service level agreement template to ensure that contracted labour and services meet minimum health and safety experience requirements. The CEO approved the policy and the service level agreement on February 2, 2020.

Do / Communicate and train

- Our change management and procurement procedures include:
 - Regular communications to alert employees of any changes to our project site operations
 - Regular check-ins by supervisors to ensure that employees understand each new change and know where to get support
- We created separate change management and procurement web pages on our internal intranet, which helped us to communicate with all employees, including those working remotely. In addition, we created a folder on our intranet where project teams can find past communications and access resources such as posters, checklists, toolbox talks, memos, etc., to manage significant health and safety changes.
- On May 5, 2020, we held a virtual meeting with all employees who have purchasing rights to review the service level agreement template changes. During this meeting we discussed the health and safety requirements for all procured goods and services, and we shared a communication plan to outline our existing supply chain's new health and safety requirements.

Check / Evaluate

- An internal audit, including employee observation, took place on September 27, 2020.
- To ensure changes were managed appropriately, our health and safety director asked each manager to provide monthly progress reports on any new or significant changes to health and safety operations within our business or supply chain. We recorded observations on a compliance document, reviewed completed hazard and risk assessments on all new operations and equipment, and completed the required training. Progress reports were reviewed by the Joint Health and Safety Committee to ensure compliance with our change management and procurement policies.
- Interviews were conducted with supervisors and employees as part of our internal audit process. We reviewed all purchasing agreements and supply contracts to ensure

compliance with the service level agreements' new health and safety requirements. In all cases of labour and supply contracts, our suppliers either met or exceeded our health and safety requirements. There was evidence of hazard and risk assessments, and pre-start training completed for all procured goods and services. Although they met expectations, some of our supply chain was missing agreement signatures on the health and safety requirements.

Act / Acknowledge success and/or make improvements

- We followed up with our supply chain to ensure that the new health and safety requirements outlined on the service level agreement were acknowledged by signature.
- All supervisors and those with purchasing power will undergo ongoing semi-annual training on the policies and procedures.

Competency

Plan / Set a standard

- To meet our legislative obligations, our employees needed to have the appropriate knowledge, skills, and attitudes to perform their duties successfully. We created a competency program that included:
 - Identification of task competency expectations
 - Competency profile for all job positions
 - Training needs review
 - Reviews at regularly planned intervals
 - Roles and responsibilities of involved parties
 - A meeting with management and senior leaders took place on March 2, 2020, to review and approve the policy and supporting documents.

Do / Communicate and train

- A competency review within the first week of new employment must document the supervisor's verification of the new employee's competency level.
- Employees filling specific roles or facing certain hazards participated in formal training.
- We developed a training matrix of required training courses and paid for individual training as needed.
- New policies and training requirements were communicated through employee meetings on March 10, April 16, and May 5, 2020. We also sent monthly newsletters detailing training requirements and schedules.

Check / Evaluate

- As part of our regular annual health and safety review audit/meeting, we audited our health and safety training and competency policies and identified a few gaps requiring action.

Act / Acknowledge success and/or make improvements

- As a part of our evaluation process, the human resources team discovered some improvements for a Continuous Improvement Plan. We began this work on December 1, 2020, and plan to complete it by February 1, 2021.

Contractor management program

Plan / Set a standard

- We have never conducted formal performance evaluations of our contractors. We wanted to develop a strong health and safety program that ensures our contractors meet health and safety requirements. This was part of a larger supply chain initiative that our company implemented, along with the WSIB's Change Management and Procurement topic.
- After creating a master contractor list, we outlined contractors' health and safety requirements and created a Contractor Management policy. These documents were finalized and approved by our executive director on May 5, 2020.

Do / Communicate and train

- All contractors must complete a health and safety orientation before working on-site, which includes watching visitors' and contractors' safety videos and successfully passing a test.
- All employees were trained on the Essential Requirements of the Contractor Management program during our annual health and safety training, which took place on August 16, 2020. All applicable personnel (supervisors and maintenance) were trained in person.
- During this training we emphasized the responsibilities we have when we host contractors. Previous observation had shown that contractors were not following health and safety protocols that we established as hosts.
- Additionally, we sent out a reminder to the contractors via email letting them know that access to the facility would be restricted to any contractors who did not respond to confirm that they understood the new requirements and/or had completed training.
- We purchased a third-party contractor management software platform that automatically pre-qualifies and ensures that contractors and suppliers meet our health and safety requirements.

Check / Evaluate

- We evaluated all supply contracts on November 19, 2020, to ensure that our contractors and site teams understood the process. We held interviews with our contractors and our health and safety leader as part of the evaluation.
- A continuous improvement plan was developed and then approved on November 24, 2020. The continuous improvement plan identified a need for our team to better administer the contractor management program and ensure that the contractor and visitors' policies are being followed.

Act / Acknowledge success and/or make improvements

- We started working on our continuous improvement plan on December 4, 2020, and have seen better alignment with our contractor management policy since the health and safety leader assumed responsibility for the overall program. A plan is in place to have all action items completed by March 1, 2021.

Control of documents

Plan / Set a standard

- We chose the Control of Documents topic because we needed to control processes and practices for the creation, review, distribution and accessibility of all health and safety related documents.
- At the same time, we chose to implement the Control of Records topic, as these two topics go together.
- Management and our administrative assistant are responsible for identifying and establishing the documentation required for the Control of Documents topic. Our senior manager approved the policy on February 5, 2020.

Do / Communicate and train

- The administrative assistant was trained on implementing, distributing, and maintaining all healthy and safety related documents through a document control system through a third-party instructor
- We let employees know where to access the master list and how to confirm they are using the latest version of each document.
- As per our health and safety, human resources and corporate policies, certain documents are posted where employees can easily find them.
- We distributed our documents via email or our SharePoint system.
- All employees were trained on Microsoft SharePoint and requested copies of documents and records using a record request form.

Check / Evaluate

- We conducted an internal evaluation of our program on November 19, 2020.
- We interviewed employees and reviewed completed forms and working documents.
- Our evaluation found that documents are being tracked and stored correctly, our employees are following the protocols correctly, and that the most current versions are being used.
- Our electronic system for tracking documents is working well, and fewer documents have been misplaced.

Act / Acknowledge success and/or make improvements

- We recognized and praised our administrative assistant's efforts in their annual performance review.
- We also provided all employees with a letter acknowledging their role in making our program a success.

Control of hazards (basics)

Topic selected: Control of hazards basics

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- greenhouse and garden centre
- small business with 12 employees
- Operations Director and our Health and Safety Representative are responsible for health and safety, and we also get help from an outside consultant

Plan/Step 1:

- The Operations Director and the Health and Safety representative took an on-line course on hazard assessment and methods of control, which was conducted by the provider February 15, 2024, during our slow time.
- The health and safety team worked with the outside consultant to determine the next steps.
 - we selected the control of hazards basics topic to ensure we had a standard procedure in place. The topic requirements for control of hazards basics were reviewed on the WSIB website.
 - A control of hazards procedure was created to help us determine the basic process we would use to select and implement controls to reduce the risk of identified hazards identified from the risk registry and from hazard reports (developed in previously completed topics).

- With the help of our provider and our consultant, at the end of January 2024, we developed a control of hazards basics policy and procedure that included:
- an outline of the hierarchy of controls with examples from our own workplace and a workplan template that shows the steps involved in control of hazards work, who is responsible for each task and what training they need (e.g., reviewing and prioritizing hazards, application of hierarchy of controls, deciding which controls to put in place, putting controls in place, monitoring and maintaining controls, and review of the policy and procedure)
- a comprehensive list of what legislation, regulatory requirements and recognized standards, requirements, guidelines, codes of practice, manufacturer/supplier instructions we must abide by in our workplace
- The final control of hazards basics policy and procedure was reviewed by the business owner and signed off on February 6, 2024. The next step was communicating and testing out our new policy and procedure.

Associated evidence files: Control of hazards policy and procedure.

Do/Step 2 and 3:

Communications:

- In February, a text was sent from the Operations Director to all employees letting them know that at our first safety talks of the season we would be discussing a new policy and procedure called the control of hazards policy and procedure and it was related to the work we continue to do with WSIB's Health and Safety Excellence program.
- The control of hazards process (mapped out in a flowchart) and a hierarchy of controls table were posted on the health and safety board for all to see in February 2024.
- In March 2024, the Operations Director outlined the policy and procedure during two safety talks that included where it was located and how we would select a few hazards identified from last season to test out part of the policy and procedure. Employees were encouraged to review the process.

Training:

- During the safety talks, in March 2024 the Operations Director trained employees on what the hierarchy of controls is and the role of employees in the Control of Hazards process. The company owner also attended to give her support and congratulations for continuing on the health and safety journey and how she fully supported the work. She also thanked everyone for their participation and patience as they work out the kinks.
- All staff attended the training and signed the attendance sheet for both safety talks.
- Everyone was asked to go to the safety board and read the two posted documents as they would be working on a real-time example of how the team would be involved.

Associated evidence files: HSR certificate of Health and Safety representative, Certificates for the hazard assessment and methods of control course for the HSR and Operations Director, Flow map and hierarchy of controls table and a photo of the Safety Board confirming postings. Both training records.

Check/Step 4:

- On June 24, 2024, the Operations Director reviewed the policy and procedure and confirmed that it contained all the topic requirements.
- The training records were reviewed and confirmed that all employees have been trained in their roles and responsibilities.
- A set of employees were asked to come in an hour before their shift to go through a hierarchy of controls exercise using a working from heights hazard example.
- As a group, and with the help of our outside consultant we worked through the risk assessment and the hierarchy of controls. The health and safety representative took notes on a worksheet as the discussion proceeded.
- This step was repeated with another set of employees who could not make the first discussion. The same hazard was discussed.
- During the staff engagements, we discovered that not everyone was clear on the order of hierarchy of controls, and why they were in that order. During the meeting it was also uncovered that the owner was not clear on their responsibilities.
- The health and safety representative and the Operations Director then met to review the notes and options and together discussed (as per our policy and procedure) what would we do next.

Associated evidence files: Worksheets and notes from staff engagements, minutes from the meeting that was a run through of the process following the staff engagement.

Act/Step 5:

- We created a list of things we needed to fix, when it needed to be done by, and who was going to do it. Two training sessions were conducted in early July 2024 to re-educate everyone on the details of the hierarchy of controls. A meeting was also held with the owner in early July reminding her of her roles and responsibilities.
- The email also included a note on how we also plan on applying the policy and procedure in real-time in the coming months using the control of hazards topic in the Health and Safety Excellence program. The email also said that as a reward for participating in the control of hazards exercise, each employee could take home a small houseplant of their choice.
- The Operations Director and the Health and Safety representative will ensure the continuation and compliance of the topic.
- We have created a schedule with selected hazards to review for the control of hazard topic.

Associated evidence files: Email from Operations Director, action plan with items completed. Copy of the plan in step 5.

Control of hazards

Topic selected: Control of hazard – slips, trips, and falls on same level

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- small warehouse in the retail industry
- 45 employees – 30 full time and 15 part-time.
- our Human Resource Manager and Health and Safety Coordinator are responsible for developing and maintaining of our health and safety program in collaboration with our Joint Health and Safety Committee.

Plan/Step 1:

- In our previous action plan, we completed the hazard identification, risk assessment and control of hazards basics topics. Through this process and a detailed review of our injury data, interviews with employees and existing control measures, we have identified that proper control measures have not been put in place to protect our employees from slips, trips, and falls from the same level. In our view, the hazard has not been controlled.
- Our goal was to reduce injuries related to slips, trips, and falls on the same level and comply with the Occupational Health and Safety Act.
- Current controls: PPE, footwear with slip resistant soles.
- We considered and applied the hierarchy of controls when selecting additional controls that would properly control and reduce the risk of slips, trips, and falls on the same level.
 - Elimination – implement a secondary containment to control any spills or leaks of stored liquids.
 - Engineering – add slip-resistant mats at all main entrances, purchase and have available bagged absorbent to safety and quickly clean spills, purchase proper floor signage.
 - Administrative – establish Slips, Trips and Falls Prevention policy and procedure, including a housekeeping process and schedule, train workers on the slips, trips, and falls risk assessment.
 - PPE – develop guidelines for appropriate footwear based on job task.
- Our Human Resource Manager and Health and Safety Coordinator developed the first draft of the slips, trips and falls prevention procedure and footwear guideline dated January 6, 2024, after reviewing current industry best practices and guidelines, reviewing Health and Safety Excellence program topic requirements and consulting with our Joint Health and Safety Committee.

- The Joint Health and Safety Committee reviewed the final draft of both documents, and our Chief Executive Officer gave final approval and signed both documents on February 3, 2024.
- This procedure applies to all employees, contractors, and visitors to the warehouse.

Associated evidence files: Signed and dated slips, trips and falls prevention procedure and Footwear Guideline.

Do/Step 2 and 3:

Communications:

- We first implemented the slips, trips, and falls prevention procedure, the footwear guideline and Falls Risk Assessment in March 2024 by sending an all-staff email with the procedures attached. We informed staff that they would receive training during their next departmental meeting in April 2024.
- Our Human Resources Manager worked with the Joint Health and Safety Committee to identify and implement the controls e.g., where secondary containment and anti-slip entrance mats were required. Also, where to place the bags of absorbent and store the signage for easy access. In doing so, they met with the supervisors of those areas to determine suitable options. All controls implemented/installed by the end of March 2024.

Training:

- Our Human Resource Manager conducted the training for each department during the month of April 2024 that reviewed the new procedure, guideline, risk assessment associated with their department and hazards they are exposed to. Training also included all existing and newly implemented controls. To ensure all employees were captured, if they were not available when their department was trained, they had to attend training with a different department. A quiz was included at the end of each session to ensure they understood the controls and expectations of how they will work safely.
- All staff were advised that if their existing footwear did not meet the current guidelines then new ones must be purchased from the footwear truck that would be arriving the following week (company expense).
- We took attendance at each session and audited our records to ensure everyone completed the training.

Associated evidence files: All training records, pictures of the installed secondary containment, anti-slip entrance mats, absorbent and signage, email communication sent to all-staff, slide deck used to deliver the training, copy of a completed quiz and summary of the quiz results. Copies of interviews with workers confirming implementation of the controls.

Check/Step 4:

- July 29, 2024, three months after training, the Human Resource Manager and Health and Safety Coordinator evaluated how well the procedure/implemented controls and training worked.
- After a review of the training records, it was confirmed that all training was complete.
- We reviewed all incident and investigation reports, hazard reports and workplace inspections from April to end of July to check for any slip, trip and fall hazards that hadn't been properly controlled.
- We also repeated the quiz from the first training session through an email sent with a link to the quiz in a free survey software platform.
- During this time, hazard reports identifying slips, trips, and falls hazards increased by 30%, but injuries dropped by 75%. We identified that it was hard to pull specific data from workplace inspections because our checklist didn't directly mention slips, trips and falls hazards.
- Reviewed both the footwear guidelines and the slips, trips and falls prevention procedures and found both to be complete.
- An inspection was conducted to confirm that the secondary containments, anti-slip matting and the absorbents packages have all be placed/installed appropriately.
- The two employees whose footwear did not meet the new guidelines, purchased footwear the following week as instructed.
- The Joint Health and Safety Committee felt the implementation went well, but noticed that a section specific to 'slips, trips and falls' had not been added to our workplace inspection checklist. This made it harder to track how often and where these types of hazards could also be identified. This recommendation was captured in the committees' minutes.
- We shared this information with the leadership team and the Joint Health and Safety Committee August 5, 2024.
- The implementation of a slips, trips and falls prevention procedure has resulted in employees proactively identifying these hazards which appears to have led to the reduction in these types of injuries.

Associated evidence files: Report sent to leadership team and Joint Health and Safety Committee, Joint Health and Safety Committee meeting minutes – July 2024, Completed incident investigation or hazard report form. Summary report.

Act/Step 5:

- We created a list of things we needed to fix, when it needed to be done by, and who was going to do it.
- Our Human Resource Manager updated our workplace inspection form to include 'slips, trips and falls' and shared it with the Joint Health and Safety Committee on August 15, 2024.

- Our Chief Executive Officer emailed all staff in August 2024, thanking everyone for their participation in training, and their efforts in reporting and addressing slips, trips and falls hazards which has led to a 75% reduction in incidents in the first three months.
- The Joint Health and Safety Committee will keep monitoring incident and investigation reports, hazard reports and workplace inspection checklists and reports to identify any additional improvements and to ensure the controls continue to be effective and used consistently. In addition, supervisor inspection forms have been updated to include a section regarding monitoring the implemented controls through employee observations and interviews.
- We will review this procedure annually.

Associated evidence files: Copy of a blank and 1 completed updated workplace inspection checklist, email sent to all staff. Copy of the plan in step 5.

Control of records

Plan / Set a standard

- Our goal was to establish a policy and procedure to monitor and maintain control of our health and safety records, develop storage and retention protocols, and make sure all records are easily tracked and retrievable.
- Our owner approved the policy and procedure on January 15, 2020.

Do / Communicate and train

- Once documents are final, they are considered “records” and can no longer be modified. We digitally store records in a secure folder. Hard copies are kept in a secured filing folder, along with all our human resources and personnel files. All employees have access to a records list and can retrieve records upon request.
- We trained all employees on health and safety documents and record-keeping on February 20-21, 2020, during orientation and annual refresher training.
- Record retention times are determined based on the record’s content, but at a minimum, they are stored for seven years to align with our tax and human resources file retention system requirements.
- All employees were trained to request records when needed by completing a records request form on March 30, 2020.

Check / Evaluate

- We conducted random interviews with employees between July and September. We found that they were all aware of our procedures for controlling records and managing documents.

- We evaluated this topic by completing an internal audit at our management meeting on November 18, 2020. We reviewed training to ensure all employees were trained, followed the protocols (i.e., completing the records request forms), and stored records properly.

Act / Acknowledge success and/or make improvements

- All employees were thanked during their annual performance reviews. During our administrative assistant's performance review on December 1, 2020, we discussed some minor improvements that they needed to make to the process for storing records. The recommendations were adapted following the review.

Corporate social responsibility

Plan / Set a standard

- We are Certificate of Recognition (COR®) certified, so we selected this topic because it goes "above and beyond" to improve our health and safety and charitable programs.
- We developed a social responsibility program with clear targets for reducing our environmental footprint and strengthening our relationships with our local community.
- We created a social responsibility standard as a team (which included senior leadership and employees) that was approved by our CEO on April 19, 2020.
- As part of our health and safety objectives for the year, we generated a list of opportunities that would enable us to either give back to community or reduce our environmental footprint. By including this as a health and safety objective, our social responsibility program became part of our general health and safety program.
- We prioritized the list of opportunities using set criteria and focused on reducing our environmental footprint.
- The first project we tackled was a clean-up event in our community.

Do / Communicate and train

- We updated employees on our commitment to charitable work and our new social responsibility program by email and at team meetings. Although no specific training was conducted, we provided employees with information about subjects like reducing waste, saving paper, and how to support local charities.
- We created a social page on our intranet where all employees were updated on our events and overall program. We also printed out our commitment to social responsibility and placed it in our lobby for all to see.
- We developed and communicated a corporate social responsibility statement, which was posted on our external website.

Check / Evaluate

- We completed all the events planned for our social responsibility program.
- We surveyed all participants who participated in events and received overwhelmingly positive feedback.
- Comments indicated that the team's morale improved, and that people felt a stronger connection to their community and the environment because of our collective social responsibility efforts.

Act / Acknowledge success and/or make improvements

- We shared a thank you letter with all employees using our social media page.
- We posted pictures of all our events and held a company-wide end-of-year event where we thanked all employees.
- We will include corporate social responsibility in future annual action plans to continue our philanthropic efforts.
- The management team celebrated these achievements with those that participated with gift cards and personal recognition cards.

Corrective action

Plan / Set standard

- We chose this topic in preparation for the new 2020 Certificate of Recognition (COR®) program and in order to meet the requirements for the Ministry of Labour, Training and Skills Development's Supporting Ontario's Safe Employers through COR® accreditation.
- We created a Corrective and Preventative Action Form, and a policy and procedure for recording, tracking, and resolving health and safety violations.
 - Corrective and Preventative Action Forms include a section on recommended actions for controlling risks as well as timelines for implementation.

Do / Communicate and train

- We communicated the policy, procedure and roles and responsibilities to all employees during a meeting on February 5, 2020.
- A training session was held on February 7, 2020, with supervisors responsible for developing and implementing corrective & preventative action.
- During training, we gave examples of when and how to use Corrective and Preventative Action forms when health and safety violations occur. For example, an employee was observed using his phone on the plant floor. His supervisor provided education on why this was an unacceptable safety risk and completed a Corrective and Preventative Action Form.

- In the example above, the employee was provided with additional health and safety training the following day.

Check / Evaluate

- On November 4, 2020, we looked at twenty recently completed Corrective and Preventative Action forms to ensure correct use by supervisors.
- We discovered that we weren't tracking and reviewing Corrective and Preventative Action Form actions in all areas as some supervisors had not submitted forms.

Act / Acknowledge success and/or make improvements

- We added a column to our accident and incident tracking spreadsheet so we can document and track corrective and/or preventative actions that we need to take. We also created a separate spreadsheet to track all other safety issues where work is needed.
- These spreadsheets were reviewed at the third quarter manager meeting, and they will be reviewed at all manager meetings moving forward. The review now includes a status update on the actions as well as documenting the effectiveness of the change.

Emergency prevention and preparedness

Plan / Set a standard

- We did not have a defined emergency prevention or response plan in place. We needed to ensure our business was ready and prepared to prevent possible emergencies via emergency prevention and response plans.
- First, our Joint Health and Safety Committee held a planning meeting to identify all possible emergencies our business could face. We then developed plans and protocols for each specific situation to educate employees on their responsibilities, hazards, how to prevent an illness or outbreak and steps to take in an emergency. We then developed an emergency-specific protocol book, which was given to all employees.
- The policies and procedures were approved on June 1, 2020.

Do / Communicate and train

- We initially communicated to all employees by email that we were developing our health and safety program. We advised that we would be training all employees on full emergencies and discussing their roles and responsibilities with their supervisors to prepare for training.
- A copy of the emergency-specific protocols was included in our health and safety policy binder, and a protocol booklet was provided to everyone in the company.
- All subcontractors and workplace parties were notified and received information on our emergency-specific procedures. They were required to sign-off that they had read and understood the health and safety protocols.

- A copy of site-specific emergency protocols is kept at each site.
- We created muster stations and provided employees with a phone number to contact for updates during emergencies
- Fire drills and mock evacuations were held on July 19 and September 4, 2020.
- To prevent the spread of communicable diseases, we set up a series of hand sanitizer stations around our office. We implemented a masking requirement for indoor operations.

Check / Evaluate

- A program evaluation took place on September 19, 2020. We identified a list of possible emergencies we might face for both our office employees and off-site employees.
- We noted that we should be conducting regular mock drills to better prepare for possible emergencies during our review.

Act / Acknowledge success and/or make improvements

- We believe we can effectively prepare for possible situations now that we have identified all emergencies and developed protocols for all possible situations, including developing power-outage kits and providing employees with emergency contact information.

Emergency response

Plan / Set a standard

- Our management and health and safety teams specifically selected this topic to address a gap in our health and safety program. Our business doesn't have a well-established practice for evacuating the building and fire response practices. No formal policies or procedures are in place regarding these and other emergencies.
- We planned to conduct three fire drills, a mock evacuation, and a test emergency lockdown to implement our policies and procedures.
- Our CEO approved our Emergency Response Policy and Procedures on January 17, 2020.

Do / Communicate and train

- The policy and procedures were provided to all employees by email to review, make notes and prepare questions for their upcoming training session with human resources and management.
- We held a series of in-person training and requested that employees sign and complete an acknowledgement of the training record to demonstrate they had completed the training.
- We completed three mock evaluations on February 9, May 19, and September 28, 2020.
- Our planned lockdown was completed on July 20, 2020.

Check / Evaluate

- We conducted a two-month evaluation to determine if we met the expectations set out in our policy. In addition, we canvassed our employees to ensure they understood what roles and responsibilities are for each staff member during an emergency according to the policy and procedure.
- We also conducted several fire and evacuation drills, which were deemed successful. Employees followed procedures and adhered to expectations set in the emergency response plan.
- Our Joint Health and Safety Committee reviewed the outcome of all our drills during the October 2020 monthly meeting.
- We noted that during the evaluation we needed to make some changes specifically to the emergency response plan. Those changes were incorporated into the policies and procedures document and changes were communicated to all staff.

Act / Acknowledge success and/or make improvements

- As part of our evaluation process, the Joint Health and Safety Committee discovered some areas that could be improved and created a continuous improvement plan. One identified improvement was to ensure our fire extinguishers are checked monthly.
- We initiated tasks on the continuous improvement plan on December 1, 2020, and have timelines to ensure that they are completed by February 1 of next year.

External audit

Plan / Set a standard

- We selected this topic to prepare for our Certificate of Recognition (COR®) external audit. We created an audit policy and process for external audits.
- Our chief executive officer approved the audit plan and process on March 14, 2020.
- We hired a part-time project manager to oversee the preparation of the external audit and ensure completion. In preparation for the external audit, our project manager conducted an internal audit on June 10, 2020.
- The external audit was planned for August 1-7, 2020.

Do / Communicate and train

- Safety talks and email notices were sent out to ensure staff were aware of the external audit, plan, and roles and responsibilities.

- Through virtual sessions that ran May 25-30, 2020, the external audit project manager presented a run-through using examples of what to expect during an external audit and reviewed employee participation
- The project manager also met separately with divisional directors to discuss roles and responsibilities during the audit process. The project manager worked closely with the Joint Health and Safety Committee to ensure any outstanding health and safety non-conformities identified on the internal audit were addressed before starting the external audit.
- The external audit took place as planned.

Check / Evaluate

- The final external audit report was received from the auditor on October 1, 2020. It was immediately reviewed for non-conformities, which we used to inform our continuous improvement plan. We then held quarterly management reviews to ensure the action items outlined in the auditor's report were implemented.
- The correcting of non-conformities began on November 1, 2020.
- Following the audit and our response to identified non-conformities, we were successful in achieving Certificate of Recognition (COR®) certification.

Act / Acknowledge success and/or make improvements

- By meeting Certificate of Recognition (COR®) certification requirements, we concluded that the audit plan had been fully implemented. The corrective actions were completed to achieve a successful external audit.
- An all-employee meeting was held to share the audit highlights and celebrate achieving our COR® certification.

First aid

Plan / Set a standard

- We lacked proper First Aid policies and procedures, so we prioritized the development of a First Aid program. We needed a formal policy and training that included a reporting process in the event of an injury that required first aid.
- Our health and safety representative (HSR) drafted a First Aid Policy and procedures document by reviewing the requirements outlined in Regulation 1101.
- Our president approved our First Aid Policy and Procedures on March 1, 2020.

Do / Communicate and Train

- We began promoting the policy on April 1, 2020, to keep it top of mind. We asked employees to support the policy and procedures by volunteering to be certified first aiders. They received training, managed the first aid station, and acted as ambassadors.
- We added a PowerPoint slide to the rotation on televisions in the lunchroom, included an update in our monthly newsletter, and posted our new policy and procedures document to the health and safety boards, next to our first aid kits and at the first aid station.
- We discussed the new policy and procedure during our June all-employee safety meeting. We posted the minutes for all employees to see.
- The First Aid Policy and Procedure are included in our training programs. We keep detailed training records, including our new hire orientation, supervisor training, and our annual refresher health and safety training.

Check / Evaluate

- All our first aid kits and logbooks are inspected monthly. We've seen good adherence to the policy and procedures in these inspections and reviews. Employees are reporting incidents using the correct form approximately 80% of the time. When the incorrect process is used, feedback was provided by the health and safety representative.
- We did a complete evaluation of the policies and procedure on December 14, 2020, to ensure all monthly inspections were completed and that employees adhered to the policy. We found that we missed a first aid kit inspection in November.

Act / Acknowledge success and/or make improvements

- To ensure we don't miss another monthly inspection, we sent out an email reminder of the importance of completing inspections as required by legislation. We have also included specific performance evaluation criteria to ensure that inspections are conducted as required

Hazard identification

Topic selected: Hazard identification

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- small business with 10 full-time employees and five part-time
- wholesale lumber company
- Health and Safety representative and Chief Operating Officer are involved in maintaining the Health and Safety program

Plan/Step 1:

- Prior to the work on building the hazard identification policy and procedure, the health and safety representative and the Chief Operating Officer participated in a hazard and risk course led by the Health and Safety Excellence program provider on December 1, 2023
- In the two weeks following January 5, 2024, the Health and Safety representative and the Chief Operating Officer met daily to work on a hazard identification policy and procedure.
- We worked on this topic alongside the hazard reporting topic.
- We reviewed the topic requirements for the hazard identification topic on the WSIB's website to ensure all elements were included in the draft policy and procedure.
- We drafted the hazard identification policy and procedure by using the WSIB topic requirements appropriate to our business. Please see attached policy and procedure. Using the list of hazards outlined under the Control of Hazards topic list and the types of hazards outlined in the Hazard Identification topic requirements found on WSIB's website, we created a spreadsheet with tabs for each of the categories: chemical, physical, biological, musculoskeletal, safety and psychological. Then we made a draft list of what we thought the hazards in our workplace might be under each tab.
- We then talked to a few people in each area of the business with the list to confirm that the hazards were captured correctly and to ask if any were missing.
- The list was then edited and a link to the sheet was embedded in the policy and procedure document.
- The draft was reviewed on January 31, 2024, by and signed off by the Chief Operating Officer.

Associated evidence files: Final version of the hazard identification policy and procedure, excel spreadsheet of hazard list to-date.

Do/Step 2 and 3:

Communications:

- On January 5, 2024, at our Monday huddle, the Chief Operating Officer announced that we were part of WSIB's Health and Safety Excellence program and that we were working on three topics, one of which included Hazard identification. She let everyone know they would be involved in the development of these, and that training on the hazard identification and hazard reporting policies and procedures would happen sometime in April.
- On February 15, 2024, the Chief Operating Officer sent a memo to all employees to let them know a lunch and learn on the newly developed hazard identification and hazard reporting policies and procedures would be happening on two days so that the storefront could still be covered. Employees who were not working on either of those days were asked to come in for training but were paid for their time as well as employees who were on their shift. The

memo also included where to find the hazard identification and hazard reporting policy and procedures should they wish to review prior to the lunch and learn.

- Following the training (see below) a Frequently asked Questions document was created and sent out to employees via email from the Chief Operating Officer. The manager checked in with employees to ensure they had received and read the email.

Training:

- Lunch and learns for all employees were held on two days, April 2 and 5, 2024. This included a power point presentation with slides on each of the sections of the Hazard Identification policy and procedure as well as the Hazard reporting process. Completed hazard inventory was reviewed with employees. Quizzes were embedded in the power point to engage employees.
- Employees signed a training attendance sheet.
- Any questions or discussion points were captured by the administrative assistant.

Associated evidence files: Certificates received by health and safety representative and the Chief Operating officer, training slide deck, attendance sheets for both training sessions, FAQs, February 15, 2024, memo.

Check/Step 4:

- On June 29, 2024, a follow-up questionnaire developed by our health and safety representative on a free survey software, was sent via email to all employees to test recall on the key elements of the hazard identification policy and procedure and review of the list of current hazards we had on file. The manager followed up with employees to make sure they received the email and were able to complete the survey.
- Based on the results of the survey, the Health and Safety Representative discovered:
 - A new hazard that was not on the current list
 - 75% of employees did not know who was responsible for the list
- As part of the Check Step, the Health and Safety Representative also reviewed the procedure and confirmed that it included all the topic requirements.
- Reviewed the training records and confirmed that all staff were trained.

Associated evidence files: Survey results (report downloaded from survey software).

Act/Step 5:

- We created a list of things we needed to fix, when it needed to be done by, and who was going to do it. In the beginning of July 2024 at two of the Monday huddles, the Chief Operating Officer and the Health and Safety representative reminded everyone about roles and responsibilities when it comes to hazard identification.

- During July 2024, the Chief Operating Officer also thanked everyone during the huddle and in a follow-up, sent an email and thanked them for completing the survey and let them know that a new hazard was identified and what that hazard was.
- The hazard list was updated by the health and safety representative with the newly identified hazard in July 2024.

Associated evidence files: Email from Chief Operating Officer, a copy of the plan from step 5.

Hazard reporting

Topic selected: Hazard reporting

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- small business 10 full-time employees and five part time
- wholesale lumber company
- Health and Safety representative and Chief Operating Officer are involved in maintaining health and safety program

Plan/Step 1:

- Prior to the work on building the hazard reporting procedure, the health and safety representative and the Chief Operating Officer participated in a hazard and risk course led by the Health and Safety Excellence program provider on December 1, 2023
- In the two weeks following January 5, 2024, the Health and Safety representative and the Chief Operating Officer met daily to work on a hazard reporting process that aligns with our hazard identification policy and procedure.
- We worked on this topic alongside the hazard identification topic.
- We reviewed the topic requirements for the hazard reporting topic on the WSIB's website to ensure all elements were included in the draft policy and procedure.
- We drafted a hazard reporting procedure by using the WSIB topic requirements appropriate to our business. Please see attached procedure.
- There is a separate flow chart for the health and safety representative and Chief Operating Officer that outlines the process for collating the information from the hazard reports, checking or adding it to the hazard registry if it is not there already and rating reported hazards (e.g., A, B, C or high, medium, low), and what a standard templated plan for correcting the hazard, including expected timelines.
- The third flowchart outlined in the hazard reporting process shows how people will be informed of any changes or steps taken to address a reported hazard.

- The process document was reviewed by the manager and the Chief Operating Officer, and any recommendations/edits were made by the health and safety representative.
- The draft was reviewed on January 31, 2024, by and signed off by the Chief Operating Officer.

Associated evidence files: Final version of the Hazard reporting process, Hazard reporting form template.

Do/Step 2 and 3:

Communications:

- On January 5, 2024, at our Monday huddle, the Chief Operating Officer announced that we were part of WSIB's Health and Safety Excellence program and that we were working on two topics, one of which included Hazard reporting. She let employees know they would be involved in the development of these, and that training the hazard identification and hazard reporting policies and procedures would happen sometime in April.
- On February 15, 2024, the Chief Operating Officer sent a memo to all employees announcing a lunch and learn on the newly developed Hazard identification policies and procedures which included the hazard reporting process would be happening on two days so the storefront could still be covered. Employees who were not working on either of the training days were asked to come in on one of those days and were paid for their time. Lunch was catered. The memo also included where to find the Hazard reporting process should they wish to review prior to the lunch and learn.
- Following the training (see below) a Frequently asked Questions document was created and sent out to employees via email from the Chief Operating Officer. The manager checked in with employees to ensure they had received and read the email.

Training:

- Lunch and learns were held on two days, April 2nd and 5th 2024. This included a power point presentation with slides on the Hazard reporting process and procedure as well as the Hazard identification process (we are working on at the same time). Employees had an opportunity to review the reporting form and ask questions if they did not understand how to complete the form. Quizzes were embedded in the power point to engage staff.
- Staff signed a training attendance sheet.
- Any questions or discussion points were captured by the administrative assistant.

Associated evidence files: Certificates received by health and safety representative and Chief Operating officer, training slide deck, attendance sheets for both training sessions, FAQs, February 15, 2024, memo.

Check/Step 4:

- In June, the health and safety representative completed an evaluation using a templated checklist. She reviewed the one form that was received, to see if it was filled out correctly. After analysis it was determined that this hazard was on the list but there was a new issue. The form was missing the date. She followed up in-person with the employee to see if anything had been done to resolve the issue or if they needed some additional help.
- On June 29, 2024, a follow-up quiz developed by our health and safety representative on a free survey software, was sent via email to all employees to test recall on the key elements related to the Hazard reporting process. The manager followed up with employees to make sure they received the email and were able to complete the survey.
- Based on the results of the survey, the Health and Safety Representative discovered:
- Employees were confused on where to submit the forms.
- A few employees commented that it was too much to have a paper and electronic version and preferred the paper version of the form. They also wanted to know if there had been any new hazards identified through reporting since they had the training and what changes have been made to address problems.
- As part of the Check Step, the Health and Safety Representative also reviewed the procedure and confirmed that it included all the topic requirements.
- Reviewed the training records and confirmed that all staff were trained.

Associated evidence files: Quiz results (report downloaded from survey software), completed hazard reporting form

Act/Step 5:

- We created a list of things we needed to fix when it needed to be done by and who was going to do it.
- In the beginning of July 2024 at the first two Monday huddles, the Chief Operating Officer and the Health and Safety representative reminded everyone about how to report a hazard if they see one and emphasized to still report it even if they are not sure it is a hazard.
- She also announced that they were moving to paper only versions of the form as that was easier for employees to access and complete.
- The Chief Operating Officer also thanked everyone during the huddle and in a follow-up email thanking employees for completing the survey. She let them know no new hazards have been added to the registry, but there had been a problem with one of the existing hazards and explained how it was fixed. She also reminded them of what the process is should a new hazard be reported and identified so that employees are protected, and what the follow-up process is to that report.

Associated evidence files: Email from Chief Operating Officer, a copy of the plan from step 5.

Injury, illness, and incident reporting

Plan / Set a standard

- We didn't have an incident, injury and illness reporting procedure in place and we also had 50% employee turnover. We needed a way to make sure all existing and new employees were aware of reporting procedures related to incidents, injuries, and illnesses at work.
- Our health and safety manager developed an incident, injury and illness reporting procedure in collaboration with the health and safety worker representative. It included the purpose, definitions, roles and responsibilities and an outline of the process to follow. The managing director reviewed the procedure, and it was approved by our owner on February 20, 2020.

Do / Communicate and train

- From March 1 to April 5, 2020, we held a series of meetings with all employees to discuss what an incident, injury and illness reporting procedure is and where a hard copy of the procedure could be located.
- We then determined we needed to conduct training and obtained all employees' commitment to complete this training.
- We provided specific training for the health and safety worker representative to understand the procedure and the legal reporting requirements before they held training sessions for the company.
- We made sure we had incident reporting forms available in our first aid room and our company intranet for easy access.
- Formal in-person training occurred on May 10, 2020. Training included the procedures for reporting incidents, injuries and illnesses, and proper use of our reporting forms.

Check / Evaluate

- We waited six months after training to allow the employees to use the procedures to evaluate the procedure. After this time, we looked at a random sample of five completed incident reports. In one of the reports, we found that even though the injury was reported immediately, the Incident Report Form was not completed before the end of the shift as required in the procedure. Our health and safety manager followed up with the individual and explained the requirement for the Incident Report Form to be filled out the same day as the injury.
- We also emailed reminders for training updates to employees to make sure any adjustments were communicated and reviewed all reported incidents during monthly safety meetings.

Act/ Acknowledge success and/or make improvements

- The corrective actions implemented because of the evaluation included posting safe lifting techniques on the Health & Safety Communication Board and discussing them in a weekly team meeting on May 19, 2021, immediately following an incorrect lifting incident.
- There have been no other incidents to report to date. However, we will continue to monitor the success of this program to make sure the procedure is followed.
- We sent a thank-you email to all employees for their participation in the program and for helping to make our organization healthier and safer.

Incident investigation and analysis

Plan / Set a standard

- Our company did not have an incident investigation and analysis procedure. We wanted to make sure we were meeting our legislative obligations. We set a goal to create a new procedure and forms that would help identify and record all requirements as the investigation was completed. The executive director approved the policy and procedure on March 1, 2020.

Do / Communicate and train

- As we are a small business with only eight employees, our executive director spoke with the whole team during an in-person training session on April 12, 2020. She included a step-by-step investigation guide as an appendix to the procedure and updated our new-hire orientation training to include incident investigation roles, responsibilities, and procedures.
- We have an employee who has volunteered to complete our investigations; she was paid to attend specific incident investigation and root-cause analysis training on May 16, 2020.
- Following the training session, results and recommendations from investigations were communicated to employees through safety talks, postings on the safety bulletin boards and the company's injury/incident logbook.
- On June 24, 2020, we held a mock investigation so that our volunteer investigator could put her learning into practice.

Check / Evaluate

- A few months after training, the executive director held interviews to determine if our employees understood the purpose of the investigation analysis
- Our volunteer created a checklist to help her complete the investigation and analysis.
- We completed an analysis of investigations that took place between February and September of 2020 and found that investigation results were not being shared with employees.

Act / Acknowledge success and/or make improvements

- Based on the evaluation, we revised the procedure as to how feedback is shared.
- The executive director sent a letter to everyone on December 4, 2020. She acknowledged everyone's contribution to the health and safety of the company and in making the program a success.

Internal audit

Plan / Set a standard

- We selected this topic to develop an internal audit program to achieve ISO 45001 certification and conduct an internal audit of our occupational health and safety management system.
- We involved all workplace parties to ensure employee involvement and participation in the internal audit process.
- Our health and safety manager developed an audit plan, assigned roles and responsibilities, and a comprehensive communication plan.
- Our Internal Audit Policy, audit procedure and internal audit plan were approved by our owner on May 1, 2020.

Do / Communicate and train

- We communicated our internal audit program at our June 1, 2020, town hall meeting. The audit process, roles and responsibilities and a request for volunteers were completed. In addition, management communicated the audit schedule during monthly team meetings.
- A notification was posted on the health and safety board at all workplace locations telling employees of the internal audit.
- Training for internal auditors on ISO 45001 standard was completed on May 19, 2020. A total of 10 employees completed the training, and records were documented and made available for review via a training matrix.
- The internal audit took place as planned between June 12 and July 16, 2020.
- Opening and closing meetings were conducted and documented in the audit report, as per policy.
- The results of the internal audit were presented to senior management and those involved in responding to the results.

Check / Evaluate

- Following the audit, a debrief meeting was held with the management team on June 23, 2020. Further, an evaluation of the internal audit process and the audit results was

completed by the Joint Health and Safety Committee and the senior leadership team on July 19, 2020.

- We identified twelve non-conformities on the audit, as well as an additional six opportunities for improvement. Non-conformities were prioritized by health and safety risk, and a continuous improvement plan was created on August 10, 2020.
- The health and safety manager developed a consultation process to correct all identified non-conformities. Progress on the continuous improvement plan was provided as an update during quarterly management health and safety meetings.

Act / Acknowledge success and/or make improvements

- Our internal audit policy and process requires a quarterly senior management review of the results of the work done to address any issues found during internal audit. The next set of reviews are scheduled for September 19, 2020, December 12, 2020, and March 5, 2021.
- The goal is to have our final non-conformity resolved by April 10, 2021.
- We will be undergoing another internal audit during the third quarter of this year.

Health and safety accountabilities

Plan / Set a standard

- Everyone has a role to play in our health and safety program. We selected this topic to create and outline the roles and the accountabilities of all employees in the workplace. This was a new initiative for our company.
- We worked with our Health and Safety Excellence program provider and senior leadership to develop the Health and Safety Accountabilities Policy our senior leader approved on February 19, 2020.
- As we are a small business, all employees share health and safety responsibilities within our internal responsibility system.
- We also developed a progressive disciplinary process should any employees fail to meet their responsibilities.

Do / Communicate and train

- We sent an email communication to all employees on April 2, 2020, and updated our health and safety binders and internal website.
- We updated the descriptions of all our jobs to include health and safety accountabilities, including the requirement to participate in our internal responsibility system.
- Employees reported a slipping hazard by using a new online hazard reporting form we created. The report was automatically sent to the manager for action. The supervisor purchased anti-slip shoes for all employees.

- Health and safety accountabilities were reviewed during our May 13, 2020, annual health and safety training.
- Quarterly safety meetings were held to monitor and review health and safety accountabilities among employees. A standing agenda item was added to discuss whether and how managers were consistently following up on health and safety complaints.

Check / Evaluate

- Our annual performance reviews include a safety component with two accountability statements for commitment and sign-off.
- We reviewed completed incident reports, disciplinary action reports, hazard reports and job descriptions to ensure the process worked correctly.
- We did not identify any significant gaps during our evaluation of completed incident reports, management meeting minutes and performance reviews. As such, we did not implement our progressive disciplinary protocols.
- Should an employee fail to meet their health and safety responsibilities, we will review our progressive disciplinary process at that time. We will continue to evaluate our health and safety program, including annually reviewing accountability to our health and safety responsibilities.

Act / Acknowledge successes and/or make improvements

- As small businesses, we acknowledge each employee's contributions to our health and safety program as part of their annual performance reviews. We take that time to recognize success and provide coaching feedback sessions.

Health and safety communication

Plan / Set standard

- We wanted to ensure our employees are engaged in our health and safety efforts, so we asked them to complete an employee engagement survey. We learned from the survey results that we could do a better job of communicating about our health and safety policies and programs.
- We used the Plan-Do-Check-Act (PDCA) model for our health and safety communication process.
- We developed a new health and safety communication protocol that was reviewed at the first quarter Joint Health and Safety Committee meeting. It was reviewed and approved by the senior management team on February 2, 2020.

Do / Communicate and train

- Our Health and Safety Excellence program provider delivered online communications training to our management team.
- We sent monthly emails to employees that included health and safety updates. We tracked the emails to ensure messages were received, read, and acknowledged.
- We inserted health and safety updates in payroll envelopes once a quarter.
- We hung posters and health and safety signage in offices.
- Supervisors held weekly "toolbox" talks with their teams to discuss health and safety topics (e.g., mental health, use of Personal Protective Equipment (PPE), pre-use inspections, etc.).

Check / Evaluate

- Our supervisors and managers called employees to ask how we were doing with work challenges and how they felt about our changes to communication. The feedback from the calls helped us evaluate our health and safety communications.
- We also conducted a quiz on October 23, 2020, and used the evaluation tool provided to us by our program provider. We discovered that we lacked a process for our employees to communicate back to us.

Act / Acknowledge success and/or make improvements

- Following our evaluation, we developed a two-way health and safety communication process for employees to communicate with senior management. We created a unique online portal where staff could ask senior leaders health and safety questions anonymously. Responses were posted on our intranet for everyone to see. We also developed a continuous improvement plan with action items to be completed by the first quarter of next year.
- We held an annual employee health and safety meeting/holiday celebration on December 1, 2020, and followed up with a thank-you email.

Health and safety continual improvement planning

Plan / Set a standard

- We selected this topic because we want to do more to help our sites continually improve their health and safety processes.
- Following an internal audit of our health and safety program, we developed a continuous improvement plan template to guide priorities and identify improvements.
- We used the template to write a health and safety continuous improvement plan. That plan and the new template were approved on January 6, 2020, by our health and safety director.

Do / Communicate and train

- We posted a copy of our continuous improvement plan and the new template on the safety boards at all facilities and sites. Electronic documents were saved on the company's intranet and were accessible to all employees.
- All forepersons and site supervisors received basic training on how to complete a continuous improvement plan for each of our multiple sites and as well as how to create site specific health and safety goals.
- We also identified corporate-wide initiatives that needed to be part of each site's plan. For example, all sites needed to complete working-at-heights training by April 1, 2020, to assign staff to work on a new high-rise.
- Our health and safety director circulated a copy of the continuous improvement plan among all department heads at each business site. Our managers reviewed the continuous improvement plan progression, deadlines, and assigned roles and responsibilities during quarterly review meetings.

Check / Evaluate

- Per our continuous improvement plan an internal audit of our health and safety program was performed at all our sites.
- Each site location's Joint Health and Safety Committee reviewed the audit reports and monthly inspections, and prepared summary reports for senior leadership.
- Quarterly senior leadership reviews found that several sites were not completing their required continuous improvement plans, the correct template wasn't being used, and we lacked the ability to formally track improvements.

Act / Acknowledge success and/or make improvements

- Work has begun on our action items, including developing an enhanced tracking procedure, and we aim to complete all activities by March 1 of next year.
- Supervisors and forepersons were encouraged to give positive reinforcement when health and safety issues were brought forward and ensure they followed up to let employees know that changes would be made.

Health and safety responsibilities

Plan / Set a standard

- We had no formal, written policy that outlined each of our employees' health and safety responsibilities. We know this is required under the Occupational Health and Safety Act. Our first step was to review human resources documentation of employee, contractor, and visitors' necessary health and safety responsibilities.

- Our vice president and our health and safety representative (HSR) drafted a Health and Safety Responsibilities Policy, which our president approved on March 11, 2021.

Do / Communicate and Train

- We sent an email memo to all employees outlining why we needed this policy and the impact we hoped to see. We requested an acknowledgement via email within a week, given that most employees work remotely.
- Additionally, we posted notices on our health and safety board and intranet.
- We presented each party's health and safety responsibilities on April 10, 2020, using an online platform. We also shared training materials that included a quiz to ensure understanding of the content.
- At the beginning of monthly employee meetings, we reminded everyone of the policy and their health and safety responsibilities.

Check / Evaluate

- We conducted observations and one-on-one interviews with selected contractors and employees from August to November 2020 to evaluate the program.
- Our analysis of the interviews showed that everyone understood their specific roles and responsibilities within the workplace.

Act / Acknowledge success and/or make improvements

- While we did not identify any specific gaps in the program, we will continue to evaluate our policy annually. We also decided to have everyone complete health and safety awareness training annually.

Health and safety objectives

Plan / Set a standard

- We selected this topic to set clear annual health and safety objectives and goals, and to ensure that a procedure for writing out those goals and objectives was in place.
- Using the Occupational Health and Safety Act as a starting point and with support from our Health and Safety Excellence program provider, our Health and Safety Objectives policy and procedures was developed by the health and safety representative (HSR) and reviewed by senior management.
- When creating our policy and setting our objectives for this year, we set timelines for achievements based on health and safety goals for the company overall first, followed by objectives for specific areas like kitchen, dining, and takeout.

- Part of the policy requires a review of each of the prior years' goals and objectives to determine the action plan for the following year.
- The policy and procedure were approved by the senior team on January 15, 2020.

Do / Communicate and train

- This plan was communicated to the employees in several different ways; we posted a spreadsheet with our goals and objectives on the bulletin board in the employees' break room, office, and health and safety board, and the final procedure was reviewed and signed off by all employees.
- This year, we updated our health and safety manual with our Health and Safety Objectives Policy and this year's goals. All employees were given a copy with the new additions and were required to sign off that they had read and understood the changes, so we could add the acknowledgements to our records.
- Our management and health and safety representative reviewed our goals. They provided updates on our progress in achieving them during our monthly all-employee meetings. We also reviewed our prior year's goals during those meetings to provide context.

Check / Evaluate

- The health and safety representative (HSR) and our management team reviewed the progress made on the current year's health and safety objectives at the monthly management meetings. They documented the progress made and issues that have arisen. The HSR completed a review against the policy and procedures to see if we were following the correct process.
- Any objectives that were at risk were assessed and solutions were proposed to the managers involved with that objective.

How do we acknowledge our successes and/or make improvements?

- A review of our 2020 health and safety objectives was discussed at our year-end meeting. All objectives that had been completed were marked as such. Those in progress were given expected completion dates and added to 2021's list of objectives.

Health and safety participation

Plan / Set standard

- We needed to make sure employees were aware of their rights to participate in workplace health and safety, encourage them to ask questions, identify hazards and get involved. We recognized this wasn't happening.
- With help from employees, our owner created and approved a draft procedure on March 1, 2020, that outlines how employees can participate in our health and safety programs.

- Ultimately, we wanted to increase all employees' awareness of their rights to participate in our health and safety programs and encourage their involvement.

Do / Communicate and train

- On April 3, 2020, we held a call for volunteers to become Joint Health and Safety Committee representatives. We promoted ways to get involved in health and safety inspections, risk assessments and hazard controls.
- We also held monthly toolbox talks with all employees. We posted the procedure on how employees can participate as well as information on employees' right to participate on our health and safety boards. Supervisors discussed the changes in one-on-one meetings with their teams.
- On May 10, 2020, we held in-person training on how to get involved in workplace health and safety and employees' rights to participate. The training ended with the employees signing a commitment to our internal responsibility system and completing a health and safety participation quiz. We've started annual refresher health and safety training, which includes the internal responsibility system and employees' right to participate. Employees must complete this training before any work can be performed.

Check / Evaluate

- Our supervisors noticed increased participation from employees during their daily toolbox talks. For example, some employees recommended new types of personal protective equipment – this feedback demonstrates the policy in action.
- On September 1, 2020, we evaluated our pre-job inspection and monthly health and safety inspections to review our employees' overall participation in our health and safety program. Our evaluation found that a few employees were not using the pre-job inspection forms to identify concerns.

Act / Acknowledge success and/or make improvements

- Following our evaluation, we had a toolbox talk on September 30, 2020, to discuss using a pre-job inspection form to participate in our health and safety program. We will continue to evaluate this and other forms of health and safety participation.
- A thank-you memo was sent to all employees on December 20, 2020, along with a gift certificate for participating in our health and safety programs.

Health and safety training

Plan / Set a standard

- The Health and Safety Training topic was an identified recommendation from the Health and Safety Excellence program's online assessment. The development of health and safety training will help us prevent and reduce incidents and ensure legislative compliance.
- Our Joint Health and Safety Committee drafted policy and procedures, including an action plan for health and safety training. They held a meeting with management and senior leaders on April 14, 2020, to review and approve the plans and documents, including the training schedule and content.

Do / Communicate and train

- Our training protocol is available in the Health, Safety and Wellness Manual located on our SharePoint site. All existing employees who were due for refresher training were required to complete the updated courses. All new hires are required to complete the new training within the first 30 days of employment. Notifications and reminders are sent to employees via their work email. Employee training sessions were conducted by senior management, our health and safety coordinator and supervisors.
- Employees filling specific roles or encountering certain hazards engage in formal training. We developed a training matrix of required training courses based on employees' exposure. Before an employee's certification expires, the individual must repeat the training or complete additional training.

Check / Evaluate

- On September 21, 2020, we circulated an evaluation to all employees, asking general and specific questions in which all employees passed. The quiz was re-issued to all employees again about three months after training to confirm understanding.

Act / Acknowledge success and/or make improvements

- As part of our regular annual health and safety review meeting, we audited our health and safety training and competency policies. Senior leadership reviewed these reports to make sure all employees completed mandatory and refresher training.
- We conduct annual reviews of the health and safety training programs to ensure our business's regulatory compliance and continued suitability.

Leadership and commitment

Plan / Set a standard

- The focus of this topic is legislated in the Ontario Health and Safety Act (OSHA) under Sections 25, 26 and 32, so we wanted to make sure that our senior management team was able to fulfil their obligations.
- We used the 5-Step model to create a program that we could continue improving in the future. A team that included the Joint Health and Safety Committee and the senior management team led the work.
- The Senior Management Commitment Policy was approved on February 20, 2020, before it was shared with the company.

Do / Communicate and train

- We posted the Health and Safety Policy and the Senior Management Commitment Policy on the safety board
 - Sent the policy and an associated memo out by email
 - Posted the policy alongside the Joint Health and Safety Committee minutes
 - Gave hard copies to employees who don't have email
 - We also held a session on this topic as part of our annual safety meeting on March 3, 2020, which included PowerPoint slides about the policy and why it's important. A representative from senior management spoke about the Health and Safety Policy Statement and why this work is essential to leadership and commitment.

Check / Evaluate

- We conducted a quiz with everyone who participated in our annual safety meeting – including senior management – to test their knowledge and application of the new policy. We then re-issued the quiz to a random sample of our workforce four months later to see if the knowledge was retained.
- As part of our employee engagement survey, we included several questions about leadership's commitment to health and safety. Employees felt that senior management were meeting their obligation.
- We also used the evaluation tool given to us by our program provider to determine what worked and what could be improved.

Act / Acknowledge success and/or make improvements

- Our engagement survey resulted in several questions from employees that required additional attention. We held a health and safety town hall on September 9, 2020. The town hall was used as a forum for management to discuss our commitment to health and safety,

and to encourage health and safety discussions among all company levels. We'll continue to have a health and safety town hall annually.

- Our employee engagement results showed that our employees felt safe and supported by senior management. We will continue to deploy employee engagement surveys annually.

Legal and other requirements

Plan / Set a standard

- We did not have a procedure to track legal requirements, and we lacked a registry to monitor compliance.
- While drafting our Compliance to Legal and Other Requirements Policy, a meeting was held with our senior leadership and our health and safety representative (HSR) to define roles, responsibilities, a communication plan, and applicable general procedures.
- We also developed a registry of legal and other requirements and included it as an appendix to the policy. Our executive director approved these on April 1, 2020.

Do / Communicate and train

- During a team training day on March 10, 2020, all the roles and responsibilities outlined in the Occupational Health and Safety Act were communicated.
- For specific legal and other requirements, these are addressed during the mandatory training for relevant employees. They are also posted on our Joint Health and Safety Committee bulletin board as a memo.
- To successfully train employees to the legal requirements related to their roles, we worked with managers to review all competency requirements and arranged for the appropriate training or refresher training.

Check / Evaluate

- To meet our legal requirements, all training certificates are documented on our training matrix (those with an expiry date are included and reviewed annually).
- The Joint Health and Safety Committee and the management team evaluated our Compliance to Legal and Other Requirements Policy against our competency needs on September 19, 2020.
- Compliance with all legal requirements is checked during monthly Joint Health and Safety Committee inspections.
- We reviewed our training matrix against all local, provincial, federal legal requirements, and industry best practices as part of our evaluation. We concluded that a review of local by-laws should occur every year rather than on a bi-annual cycle.

Act / Acknowledge success and/or make improvements

- Overall, training and compliance to legal and other obligations have been acknowledged through a letter sent out by the executive director to all employees and updated on our health and safety board.

Management review

Plan / Set a standard

- We decided to select this topic as we found a significant gap in our management review process during last year's internal audit.
- Our Joint Health and Safety Committee and management team created a draft Management Review policy, which our owner approved on January 20, 2020.

Do / Communicate and train

- We trained field employees on our health and safety management review process through toolbox talk training and eLearning for office personnel.
- Emails were sent on March 10, 2020, to all foremen, senior management and the Joint Health and Safety Committee.
- As a review of our health and safety performance had not previously occurred, our health and safety manager completed a three-year review of our reported injuries and illnesses and identified several trends. For example, we noticed that we were experiencing an increase in injuries from slips, trips, and falls.
- Quarterly management health and safety meetings were held to review issues identified by our Joint Health and Safety Committee and all incident reports, so we could analyze trends.
- An internal audit of our health and safety program was held June 10-20, 2020. A continuous improvement plan was created based on audit results.

Check / Evaluate

- The results of this year's internal audit on September 6, 2020, were a significant improvement over last year's results (89.31% this year, versus 66% last year).
- The new standard resulted in improved employee understanding of the role senior management plays in health and safety, quarterly management review of safety-related issues on site, safety statistics such as incident rates, near misses, etc.
- We hired a full-time health and safety consultant to assist our health and safety manager, and they joined the team on November 20, 2020. Our new health and safety consultant is responsible for following up on all reported incident reports, ensuring pre-use inspections are completed and identifying the key gaps requiring improvement from our internal audit.

Act / Acknowledge success and/or make improvements

- As noted above, we hired an additional health and safety consultant. We also created an additional management working group to perform a yearly health and safety analysis.
- The audit showed us that supervisors have not been consistently filling out required health and safety reviews. Management performance objectives have been updated to address this gap.
- We held a celebration event following our internal audit to discuss health and safety priorities and thank all employees for their involvement in our health and safety program.

Monitoring, measurement, and analysis

Plan / Set a standard

- We identified the Health and Safety Trends topic and the monitoring, measurement, and analysis topic as two we wanted to develop this year.
- The Health and Safety manager was assigned oversight of the collection and reporting of the data.
- We set a series of objectives to meet and outlined a policy and procedure, which were approved by senior management on March 1, 2020.

Do / Communicate and train

- The new policy was communicated to all current employees through in-person training. It was communicated to new hires, senior management, supervisors and health and safety departments on April 10, 2020. The policy was also posted on safety bulletin boards.
- All staff had the opportunity to ask questions about their role and responsibilities towards monitoring, measurement, and analysis.
- We underwent an internal audit of our health and safety program to identify areas of improvement.
- We observed employees performing job duties, monitored pre-use inspections, and analyzed all completed inspection reports.

Check / Evaluate

- As a result of observations, we found that we needed to ensure our air quality was sufficient.
- An air quality assessment was completed on March 2, 2020, to address the measurement of air quality.
- The health and safety team conducted a review from November 3-6, 2020. A statistical analysis by senior management, supervisors, and the Joint Health and Safety Committee members was also completed.

- We realized we needed to incorporate more employee feedback to ensure the data was relevant and helped to protect their well-being.

Act / Acknowledge success and/or make improvements

- Using the air quality as a pilot project for the Monitoring, Measuring and Analysis Policy, we developed an action plan for the year to address all areas that require monitoring, measuring and analysis. The updated policy will be communicated to employees in Q2 of next year. There is a plan to monitor, measure and communicate trends in exposures, hazards, risks, and injuries on an on-going basis.

Networking and peer learning

Topic selected: Networking and peer learning

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- facilities management
- large business with 300 employees
- we have several Joint Health and Safety Committees that represent different business sites
- the Chief Operating Officer, and VP Operations are the senior leaders accountable for all things health and safety, and we also have a Health and Safety Director and Health and Safety Manager

Plan/Step 1:

- In January 2024, the Health and Safety Director recognized an opportunity for members of the Joint Health and Safety Committees to meet with each other and network internally about health and safety issues across our divisions. The Vice President of Operations agreed this was a good idea to pursue and thought the learnings would enhance their health and safety culture and initiatives.
- One of the Joint Health and Safety Committee (JHSC) members also suggested that our business might benefit from access to safety professionals and health and safety coordinators outside the organization to expand their knowledge and experience.
- The Health and Safety Director convened a meeting with all the Joint Health and Safety Committees and facilitated a brainstorming session about how we might structure these two opportunities.
- From this session the H&S Director and H&S manager drafted a Guide to Health and Safety Learning and Collaboration which includes:
 - Terms of reference for quarterly Collaborative JHSC group collaborative meetings
 - Standing agenda items for meetings

- External engagement process:
 - Description of our health and safety association and our Health and Safety Excellence provider – who they are, how and when to access
 - Methods of networking: emails, newsletters, conferences, personal contacts, Health and safety events.
 - Where to find opportunities to participate in learning and networking
 - Application process to attend networking opportunities
 - Roles and responsibilities to report back learnings to the Collaborative JHSC group
 - Policy and procedure for sharing information externally (who, when and how)
- The Collaborative JHSC group reviewed the guide and updates based on the recommendations were made to the document by the Manager of Health and Safety.
- The VP Operations reviewed and signed off on the guide in March 2024

Associated evidence files: Agenda, notes and pictures of flip charts from brainstorming meeting, signed and dated: Guide to Health and Safety Learning and Collaboration

Do/Step 2 and 3:

In April 2023, using the first draft of the guide, the following occurred:

Communications

- The Health and Safety Director sent an email, and copied the VP of Operations and the Chief Operating Officer to let the JHSC members know where they could find the final version of the guide. They also welcomed them to the collaborative group and thanked them for participating in the development of the Guide. The group was asked to read the final document prior to coming to the first joint meeting scheduled for May 2024.
- A news story was featured on the intranet and a text was sent to all employees letting them know about the article which talked about the new collaborative JHSC group and how opportunities for anyone interested in furthering their health and safety knowledge.
- For employees with no internet access or phone, a copy of the article was posted on the health and safety board and managers were instructed to let everyone know there was a copy there as well.
- For employees where English was not their first language, there was an opportunity for them to access translation services in HR for a summary of the article.

Training

- In April 2024, the Collaborative JHSC Group met for a hybrid half day meeting.
- The agenda included training on the guide, discussing next steps and a brainstorm on what associations or groups where the business should be a member or have representation. It also included a presentation by each of the Joint Health and Safety Committees on a recent

health and safety project or initiative that they implemented and what their lessons learned were.

- A guest speaker was invited to talk about psychological health and safety.
- The meeting was recorded for those participating virtually and who could not make it.
- Minutes were completed by a volunteer from one of the committees and was sent out to the group.
- An email was sent to all employees with the application form for attendance at networking opportunities and a list of sites where they might find courses/workshops/conferences of interest on health and safety. They were encouraged to discuss what options might be good and budget limitations with their manager.

Associated evidence files: Agenda, minutes from half day meeting (included who was present), article, psych safety presentation, Joint Health and Safety Committee presentations.

Check/Step 4:

- The Health and Safety Director reviewed the policy and procedure and confirmed that it contained all the topic requirements.
- After every meeting, we sent a survey to participants following the meeting. The evaluations were positive, but it was suggested that lunch should be provided after the meeting to allow for additional networking opportunities.
- Between April and end of August, the Health and Safety Director tested out the application process and applied for his organization to become a member of the Business Council for Occupational Health and Safety (BCOHS), an association of Ontario employers that focussed on improving occupational health and safety. The VP operations approved the application, and the Director applied to be a member of the group. He was approved and joined in April 2024.
- There were no employees outside of the collaborative JHSC group that used the application.
- Two quarterly meetings have taken place, in April and end of July.
- There were over 100 clicks on the article.
- After the talk on psychological health and safety the group decided that as an organization they would work together and choose related topics as part of the Health and Safety Excellence program as they did not have a formal program in place to assess and address psychosocial factors.

Associated evidence files: Report on the evaluation by question, BCOHS membership certificate, copy of the signed and dated evaluation checklist.

Act/Step 5:

- We created a list of things we needed to fix, when it needed to be done by, and who was going to do it.
- One item was also added to the standing agenda items: Updates on Committee participation and a review of the hazard registry/new hazards (this would also include a change to the hazard identification and reporting policy and procedures).
- The next Collaborative JHSC group meeting was scheduled for Oct 2024.
- A gift certificate for a café was sent to all participating members of the Collaborative JHSC group was sent with an email from the VP of Operations thanking them for all their work in developing this peer network.
- All employees were sent an email from their managers to remind them about the application process for learning and development in health and safety.

Associated evidence files: email with gift certificate link. Copy of the completed action plan, copy of the new agenda. Copy of the plan in step 5.

Pre-use inspections

Plan / Set a standard

- We chose this topic because we are planning on becoming 2020 Certificate of Recognition (COR®) certified, and we hadn't been conducting inspections on any equipment or machinery before use. Implementing daily pre-use inspections will help reduce the potential of injury or equipment malfunctions.
- Our department managers and Joint Health and Safety Committee reviewed the current hazard assessment to determine:
 - Which departments are impacted by this new program
 - Which equipment will require pre-use inspections
 - Who will complete inspections and in turn require inspection training
- Once an inventory list of equipment was finalized, the Pre-use Inspection policy was developed by our senior leadership in collaboration with our Joint Health and Safety Committee and approved by senior leadership on March 20, 2020.

Do / Communicate and train

- We communicated our pre-use policy to all employees via toolbox talks and monthly safety meetings. We determined that an all-in-one inspection checklist would be the best tool for us, and that it would consistently help employees perform pre-use inspections.

- We began implementing our pre-use inspection forms and safe operating procedures in April. Our crews completed the necessary documents and then sent them to management to ensure they're stored correctly.
- All failed pre-use inspections are posted on our health and safety board, and equipment is immediately locked out.

Check / Evaluate

- Supervisors monitor their employees to make sure pre-use inspections are being completed as required.
- We reviewed our 50 most recent pre-use inspections to ensure they met the Health and Safety Excellence program requirements.
- We completed an evaluation on September 15, 2020. We found that employees perform pre-use inspections correctly and document on the correct forms most of the time, but not everyone was conducting inspections daily.

Act / Acknowledge success and/or make improvements

- Following our evaluation, we held additional training on pre-use inspections. We held one-on-one coaching sessions to confirm the forms were completed. We have developed a continuous improvement plan and will conduct a follow-up evaluation in January next year to determine if further improvement activities are needed.

Preventive maintenance

Plan / Set a standard

- We chose this topic to ensure we had a Preventative Maintenance standard.
- The first step was to develop Preventative Maintenance policy and procedure. We also developed an inventory list of all our company tools and equipment.
- The health and safety representative (HSR) created a Preventative Maintenance policy and made sure it met all the requirements outlined in the Health and Safety Excellence program topic guide. They also developed the inspection standards and completed pre-use inspections (i.e., manufacturer's instructions and legislative requirements) for all our company equipment and tools. This process took approximately one month to complete. Once the draft policy was completed, the Health and Safety Representative then developed a standard recording form to be used, which was approved by senior leaders on March 1 of this year.

Do / Communicate and train

- Our maintenance employee was trained on safe operating procedures on April 10, 2020, where the preventative maintenance program standard was discussed.

- The Health and Safety Representative and manager teamed up and developed a tool maintenance checklist. Employees need to inspect machines, complete a log, and identify any deficiencies in machines and tools before use. This is part of our health and safety compliance program, and corrective action is taken if employees don't use the form.
- A copy of the PM policy is included in new hire orientation and annual health and safety refresher training. A copy is also included in our health and safety binder, and in our shop floor health and safety manual.
- The maintenance employee must complete training according to a training matrix, which outlines the inspection schedules, training schedules, and competency requirements to work on specific machines. They are required to sign off on training and can't work until they complete training or have the necessary competencies.

Check / Evaluate

- An evaluation of our maintenance matrix from March-August was completed on August 20, 2020, to see if we met our PM schedules. Our review showed that a digital report could improve the quality and quantity of submissions of PM reports. Paper reports usually have issues such as incomplete reports, damage due to the weather, or dust from the site.
- We also found that one of our forklifts was due for annual maintenance, which was not correctly recorded. Our maintenance employee had missed an inspection due to illness.

Act / Acknowledge success and/or make improvements

- Following our evaluation, we developed a secondary inspection process. The number of checklist submissions increased, which demonstrates our employees' understanding and compliance with the program. Our maintenance employee understands they are responsible for reporting minor deficiencies. It has improved the tracking of machines and equipment use.
- We have also started to develop a digital report as part of a continuous improvement plan for next year.

Psychological health and safety 1 – assessing your risk

Topic selected: Psychological health and safety 1: assessing your risk

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- Expanding Borders Marketing
- 19 employees
- health and safety representative
- marketing firm

- our owner, Alex Starr, and our Human Resources manager, Bryan Jackson, manage the health and safety program

Plan/Step 1:

- We started working with a large client, and with increased workloads we observed a drop in work quality, lower morale, and rudeness towards clients and among colleagues. We needed to address these issues but did not have an existing written standard for identifying and assessing risk of psychosocial factors.
- Our first step was to create a working group on March 8, 2024. The members included our health and safety representative, Human Resources Manager, and employees from our creative and administrative support teams to ensure different perspectives were captured.
- The working group reviewed different psychosocial factor assessment tools, and determined a paper-based survey would be best. They used the questions in a free resource from WorkSafeSask for assessing the thirteen psychosocial factors and their workplace impact. The questions were slightly modified to accommodate “agree or disagree” answers so that the results could be easily analyzed.
- The Psychosocial Risk Assessment procedures were written by the working group, using the Psychological Health and Safety topics member support guide. It was approved by our owner on April 29, 2024. The working group made sure they met all the requirements outlined in the Health and Safety Excellence program topic, including a statement demonstrating leadership’s commitment to a psychologically healthy and safe workplace.
- Our owner and HR manager completed the Canadian Center for Occupational Health and Safety’s “Reducing Mental Health Stigma in the Workplace” and “Psychological Health and Safety Awareness” courses on May 21, 2024. They also reviewed the Mental Health Commission of Canada’s “Mental Health First Aid Guide for Managers” to learn how to respond to employees who disclose mental health concerns. A written procedure was then developed for leadership to follow when an employee discloses a mental health concern and signed on June 6, 2024.
- June 10th through the 14th, the working group gathered an inventory of internal and external psychological health and safety supports and identified the internal supports that were under-utilized.

Associated evidence files: Psychosocial Factor Risk Assessment procedures (written standard), employee survey questions, procedure for Supporting Employee Who Discloses Mental Health Concern, inventory of supports and their usage.

Do/Step 2 and 3:

- The working group reviewed Ottawa Public Health’s videos on the thirteen psychosocial factors to learn more about them before writing the Psychosocial Risk Assessment procedures. This training was completed between March 14th and 15th, 2024.

- Alex sent a company-wide email on May 10, 2024, pledging her commitment to preventing work-related mental harm, reviewed details of the Psychosocial Factor Risk Assessment procedures and introduced members of the working group.
- We hosted an all-staff meeting on May 13, 2024, for awareness training on psychological factors to employees. We also reviewed the written standard with the employees and answered any questions they had. We also shared details of the upcoming anonymous survey with encouragement to complete it and provided time for questions and feedback from employees.
- Employees were provided a one-page, two-sided survey to complete anonymously on June 3, 2024 and return to a folder by the end of the week.
- Leadership was trained on the procedure to follow when an employee discloses a mental health concern on June 14, 2024.
- Alex reviewed the procedure for Supporting Employee Who Discloses Mental Health Concern at an all-staff meeting on June 20, 2024, so employees knew what to expect if a mental health concern is shared, and introduced the working group members.
- The assessment survey results were reviewed by the working group on June 24, 2024. Alex then followed up with two employees in each area of the business to get a better sense of the survey responses.
- On July 12th the results were further reviewed and categorized, then compiled into a risk registry with an average rating for each question. Potential risks to employee well-being were prioritized in order of their ranking and strengths were also identified.
- Alex presented the survey findings and plans to improve the work environment and to have an open discussion at an all staff meeting on July 22, 2024.

Associated evidence files: Copy of staff communications (meeting minutes and company wide emails), Summary of the employee survey results, completed risk registry, training records.

Check/Step 4:

- The working group evaluated the implementation of the topic on October 25, 2024.
- We found that we had good participation on the employee survey used for assessing the psychosocial factors (90%). The feedback from employees was positive for the process to support employees who disclosed mental health concerns.
- The procedure was reviewed comparing it to the Health and Safety Excellence program topic requirements to determine if any adjustments were needed. The working group agreed that no changes were required at this time.
- The working group identified a deficiency where the final risk registry had not been shared with the employees.
- We reviewed training records and found that all working group members, leadership, and employees had completed the training identified for their role.

Associated evidence files: excel spreadsheet showing all training was completed.

Act/Step 5:

- On October 29, 2024, we created a list of things we needed to fix, when it needed to be done by, and who was going to do it.
 - We had a celebratory all staff meeting on November 6, 2024, and Alex shared:
 - The outcome of the assessment and presenting the completed risk registry to all employees
 - The positive feedback received on the procedure to ensure consistent support to employees who disclose a mental health concern.
 - An ongoing commitment to psychological health and safety with annual reviews of procedure and registry.
 - Next action steps to address the psychosocial hazards that had been identified.

Associated evidence files: pictures from the celebratory all staff meeting. Training records.

Psychological health and safety 2 – reducing your risk

Topic selected: Psychological health and safety 2: reducing your risk

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- Expanding Borders Marketing
- 19 employees
- health and safety representative
- marketing firm
- our owner, Alex Starr, and our Human Resources manager, Bryan Jackson, manage the health and safety program

Plan/Step 1:

- After completing our psychosocial factor assessment in July 2024, we wanted to create a procedure that we could use to select and implement controls for psychosocial hazards so that we could start preventing work-related mental harm.
- We set up a working group on January 15, 2025, to ensure employee participation in the development of our procedure and to assist in selecting and implementing controls.
- We developed a procedure to follow when selecting and implementing controls for psychosocial factors. This included all Health and Safety Excellence program topic requirements including a statement of leadership commitment to monitor psychosocial

hazards and to implement additional controls on an ongoing basis. The written procedure was signed on February 26, 2025, by our owner, Alex.

Associated evidence files: Controlling Psychosocial Hazards procedure, Working group member list.

Do/Step 2 and 3:

- Before writing the Controlling Psychosocial Hazards procedure, the working group members completed the “Being a Mindful Employee: An Orientation to Psychological Health and Safety in the Workplace” from Canadian Centre for Occupational Health and Safety (CCOHS) on January 28, 2025. This allowed for deeper understanding of the thirteen factors. The working group also reviewed the Evidence-based actions for psychological health and safety from Workplace Strategies for Mental Health to understand different controls that could be considered for each psychosocial factor.
- Alex sent a company-wide email on March 6, 2025, to share steps that would be taken to address the psychosocial hazards we identified, including plan details and the working group members. Within the email, feedback and suggestions were encouraged to consider when developing the controls.
- The existing risk registry was reviewed by the working group on March 15, 2025. They identified Work-life Balance as the critical psychosocial hazard. Our goal was to select and implement controls that would reduce or eliminate the risk to employee well-being.
- Individual team managers reviewed the new controlling psychosocial hazards procedure with their teams between March 6-15 and encouraged them to reach out to the working group with any training.
- The working group discussed potential controls to address the risk to employee well-being including the barriers to implementing specific controls over a few meetings. The hierarchy of controls was considered and applied as we reviewed potential controls. We were able to identify controls and then created a plan for how the controls would be implemented.
- We implemented and documented the following controls on April 25, 2025, to address work-life balance and reduce workplace stress:
 - Flexible Fridays (administrative control).
 - Monday “Jump Start” Meetings to re-assign work (administrative control).
 - No-Meeting Wednesdays (elimination control).
 - Effective Meeting Scheduling (administrative control)
- We hosted an all staff meeting on April 30, 2025, to provide training on the new controls and provided opportunity for employees to ask questions and provide their feedback. Overall based on their feedback, employees were happy with the plan and identified controls, and shared how they felt it would improve the workplace.

Associated evidence files: Copy of the documented controls (Flexible Fridays, Monday “Jump-Start” Meetings, Effective Meeting Scheduling and No-Meeting Wednesday), copy of company-wide emails and staff meeting minutes, excel spreadsheet showing all completed training.

Check/Step 4:

- The working group collected information to review the impact of the controls. They monitored morale and noted there were no complaints of incivility and re-ran the psychosocial factor assessment survey through the second week of July, which had promising results as they were overall positive. We also noted that the quality of work had improved.
- The working group reviewed the information on July 27, 2025. We saw reduced reports of incivility, interviewed supervisors reported improved morale among teams, and an improved quality of work. We interviewed employees and they reported being happier. The health and safety representative observed employees appeared happier overall while conducting workplace inspections.
- The working group created a checklist, and the procedure was reviewed according to the topic requirements to determine if any adjustments were needed but the working group agreed that no changes were required at this time.
- We reviewed training records to confirm that all employees had received training on the new controls.

Associated evidence files: Summary of the information reviewed by working group and the employee interviews (questions confirming implementation). Checklist used to evaluate the implementation.

Act/Step 5:

- Although no deficiencies were identified, we are hiring two more associates to further reduce workload stress and have updated our Employee Assistance Program to include more online counselling. We have also promoted other resources available to staff.
- We held a staff meeting on August 12, 2025, to share and celebrate our success with our positive observations and feedback, provided an update on hiring more staff to reduce workload, and highlighted the updates made to the Employee Assistance Program (EAP).
- We will continue to use the identified process to implement controls for remaining psychosocial hazards.

Associated evidence files: Minutes from the all-staff meeting, Email promoting resources to staff.

Return-to-work program requirements, forms, and tools

Plan / Set a standard

- We didn't have an existing Return-to-work program.
- We were experiencing increasing claims because of work-related injuries. We designed our return-to-work program to help return us to regular operations
- Our return-to-work policies, procedures and documents were developed by the Joint Health and Safety Committee. We created templates for managing a return-to-work plan and supporting documentation such as sample accommodation requests, incident reporting forms, and evaluation plans.

Do / Communicate and train

- All employees were trained through an online platform. The Joint Health and Safety Committee met and assigned a return-to-work coordinator as a part of this process.
- All employees were trained from July 16-30, 2020. They were instructed to be aware of the new procedure, their responsibilities, and the organization's tools. We provided copies of the procedure and the accompanying forms.
- Our Joint Health and Safety Committee members delivered a PowerPoint presentation for all employees and sent out a shared link containing the new procedure and forms.
- Forms are available in the first aid room and can be accessed online at any time.
- When our employees began returning to work, they were asked to complete the required forms. Both the employee returning to work and their supervisor attended weekly return-to-work follow-up meetings.
- We created a functional abilities form for treating medical professionals to fill out when employees make accommodation requests. We asked that the form be completed three days before the employee's return-to-work date. In one instance, an employee did not have access to a physician, so couldn't have the form done. We found a physician for them, and the form was completed.
- Requests for medical accommodation were reviewed both at weekly management meetings and quarterly Joint Health and Safety Committee meetings.

Check / Evaluate

- Random interviews about the return-to-work program and procedures were completed in July and August 2020. The results were communicated to the managers and the Joint Health and Safety Committee. The minutes of those meetings and the results were shared with all employees.

- All incidents that required a return-to-work plan were evaluated during our Joint Health and Safety Committee meeting in September 2020. We checked to determine if our return-to-work policies, procedures, forms, and tools were utilized correctly in each case.
- We found that the procedures didn't have a dispute resolution process as per the topic requirements.

Act / Acknowledge success and/or make improvements

- A dispute resolution process was added, and we provided additional training on December 10, 2020.
- A thank-you letter was sent to all employees, signed by our owner.
- We focused on Return-to-work program. We needed to ensure all employees were fully aware of our return-to-work processes and shared responsibilities.

Return-to-work roles and responsibilities

Plan / Set a standard

- Return-to-work roles and responsibilities were created in our first quarter Joint Health and Safety Committee meeting. We assigned roles and responsibilities for all parties and created the position of return-to-work coordinator. We included a matrix of defined roles and responsibilities in our return-to-work policies and procedures.

Do / Communicate and train

- We provided a letter with a sample of our return-to-work program, including our shared responsibilities, in each employee's pay on the first payday in February 2020.
- A copy of the policy was also posted in the workplace on our health and safety boards and in all occupational health and safety binders to make sure it was available to all employees.
- Return-to-work roles and responsibilities documents were made available in our first aid room.
- On March 4, 2020, the Joint Health and Safety Committee, in conjunction with leadership, held training sessions for all employees. Supervisors were instructed on when and how to contact an employee after an injury has occurred. Return-to-work roles and responsibilities of all workplace parties were described in detail.
- Following an injury at work on March 19, 2020, our return-to-work coordinator was able to try out the roles and responsibilities.
 - For example, they contacted the injured person by phone on the same day. The injured person was able to obtain appropriate medical information and help identify possible accommodations at work.

- A return-to-work planning meeting took place where the injured person and their manager worked together to find a suitable position, so there was no time lost from work.
- Weekly return-to-work follow-up meetings took place, and a closure meeting was held on May 10, 2020.

Check / Evaluate

- By reviewing completed return-to-work weekly reports from the test incident above, we noticed that several were not completed correctly. Our return-to-work coordinator developed a new form and tool to address those gaps.
- From that point onward, they and the injured person completed weekly progress reports using the amended forms and tools until the return-to-work plan ended.

Act / Acknowledge success and/or make improvements

- Our return-to-work coordinator developed additional return-to-work responsibilities based on the above evaluation which were re-communicated to all relevant staff.
- The policy will be reviewed every three years, or whenever an opportunity for improvement is reported or identified.

Review health and safety trends

Plan / Set a standard

- We created an educational program to improve the way we communicate health and safety trends and make decisions. Our president approved the program outline on April 4, 2020.
- The Joint Health and Safety Committee was assigned oversight of the collection and reporting of the data to key stakeholders.

Do / Communicate and train

- We developed an internal safety statistic tracking system, which allows senior leaders to monitor and support supervisors as they work, to ensure company health and safety targets are met.
- On May 15, 2020, a conference call was held with all supervisors, the senior management team and the Joint Health and Safety Committee. We created an internal supervisor safety statistic tracking sheet and made it available to all employees on our shared server.
- Project managers and superintendents reviewed a summary related to hazards, inspections and other health and safety trends monthly through a standardized power point deck sent via email. The safety statistic tracking sheet was also updated monthly and available for review.

- Supervisors were trained on how to use a new software system to access information during a virtual team meeting and presentation on April 16, 2020.
- Once supervisors gained access, they began to receive automatic reminders for inspections and audits. The assigned managers and the health and safety department used these reminders to follow up on outstanding tasks or make decisions on areas that looked like they were at risk.

Check / Evaluate

- Our senior management team and the Joint Health and Safety Committee reviewed the internal supervisor safety statistic tracking sheet at the end of the construction season in November 2020.
- An evaluation showed that we were missing the presentation of some key information to help with decision making like 5-year injury trends. We determined that additional information was needed, and the new slide deck was developed in March 2021.
- We also identified that supervisors are still not meeting weekly site inspection requirements.

Act / Acknowledge success and/or make improvements

- We also developed a new method to perform site inspections so that further weekly inspections are not missed as part of the reporting mechanism.

Risk assessment

Plan / Set a standard

- We didn't have an existing risk assessment procedure, policy, or registry, which is a step in our journey towards achieving the Certificate of Recognition (COR®) certification.
- Our Risk Assessment Policy, control procedures, and hazard registry were written by our Joint Health and Safety Committee and were approved by our president on April 19, 2020.
- Our risk assessment procedure outlined a five-step process:
 1. Identify all workplace hazards
 2. Decide who might be harmed and how
 3. Evaluate the risks and decide on control measures
 4. Record findings and implement them
 5. Review the assessment and update, if necessary

Do / Communicate and train

- We held weekly one-hour meetings with senior leaders, supervisors, and critical support employees to discuss reporting and identifying hazards and ideas to control or prevent them.

- We trained all employees on the requirements to report hazards, the identification of possible risks and how to document. The Joint Health and Safety Committee members received practical training provided by our program provider on June 20, 2020, to improve their risk assessment and hazard identification skills. Our Joint Health and Safety Committee co-chairs participated in additional risk assessment training through our Health and Safety Excellence program provider.

Check / Evaluate

- We identified over 200 possible hazards and associated risks. We prioritized the level of risk against the potential for injury and developed a plan for control of high priority risks.
- An evaluation of our program was done on November 4, 2020. We concluded that our risk assessment processes are working well and didn't find any gaps. We didn't use any new equipment this year.

Act / Acknowledge success and/or make improvements

- Performance objectives for management included understanding risk assessment and hazard identification. Managers were recognized for their participation in risk assessment by their senior leaders as part of their annual performance reviews, and in an email dated December 10, 2020.

Workplace health promotion

Plan / Set a standard

- We selected this topic because we wanted to make it clear that our employees' mental and physical health is important in our workplace.
- The Joint Health and Safety Committee and the senior manager met to find ways to support our employees' mental and physical health.
- A workplace health promotion policy was created on April 2, 2020.

Do / Communicate and train

- Our health and safety representative (HSR) posted the Workplace Health Promotion Policy on the safety board. We also emailed the policy to employees on April 5, 2020, along with a memo and posted it with the monthly safety meeting minutes. Employees that don't have email were given hard copies.
- To promote and support our employees' physical and mental health, we:
 - Established an employee assistance program through a third party for all employees
 - Started hosting weekly lunchtime yoga
 - Provided staff with a monthly wellness newsletter

- Launched an anti-smoking campaign
- We conducted an engagement survey to determine our employees' perception of their wellness.

Check / Evaluate

- The engagement survey results, and the number of reported injuries and illnesses showed employees' self-reported wellness improved overall, but also identified a need for ongoing support.
- During the year-end health and safety meeting, our employees reviewed and provided feedback on the workplace health promotion policy. We found that additional mental health support was needed. Activities to support our employees' mental and physical health are ongoing.

Act / Acknowledge success and/or make improvements

- Following each wellness event, we thanked employees for their participation.
- Our engagement survey will provide us with a method to gauge our employees' perception of our health and safety culture. We included the recognition of success section in our internal newsletter.

Workplace inspections

Topic selected: Workplace inspection

Provide a description of your company, number of employees, industry/business activity, who is involved in developing and maintaining your health and safety program:

- medium business with 80 employees
- three locations
- machining company
- Joint Health and Safety Committee, HR Director, Administrative Assistant, and Chief Operating Officer are involved in maintaining health and safety program

Plan/Step 1:

- Workplace Inspection was chosen as our topic to help us build a safe and compliant work environment.
- Using the Health and Safety Excellence program topic requirements for Workplace inspections, a volunteer from the Joint Health and Safety Committee drafted a policy and procedure in January 2024. We drafted the workplace inspection policy and procedure by using the WSIB topic requirements appropriate to our business. Please see attached policy

and procedure The inspection checklist was developed from a sample provided on CCOHS's website.

- A no-blame statement was also included in the policy to help employees feel safe with the inspection process.
- The policy and procedure were reviewed by the Joint Health and Safety Committee members, and the HR Director, to ensure it made sense and met the requirements for the topic and went through several edited iterations. It was then presented to the Chief Operating Officer and the Chief Executive Officer in January 2024 who signed off on the Workplace Inspection policy and procedure.
- There is a version control section in the policy and procedure that allows for signatures and includes a review schedule to ensure it is maintained and up to date.

Associated evidence files: Workplace inspection policy and procedure, inspection checklists, inspection report template

Do/Step 2 and 3:

Communications:

- On February 15, 2024, the Chief Executive Officer sent a memo to all employees to let them know the business had joined the Health and Safety Excellence program, the name of the provider they were working with, and what topics they were working on which included a Workplace Inspections Policy and Procedure. They also let them know that the supervisors or managers (depending on the area of work) would be using a future regular meeting platform (e.g., safety talks or project meetings) to go over the process for the next year and how they will be involved. He also let them know where the schedule of inspections would be posted in each building and reminded them of their responsibility to continue to report any new hazards once identified.
- On February 17, 2024, Managers and supervisors were provided with a copy of the workplace inspection policy and procedures and the document was discussed and reviewed over several management meetings to ensure understanding of roles and responsibilities.
- In March, the managers and supervisors relayed key pieces of information at regularly scheduled meetings to ensure all staff knew of the policy and procedure and that inspections would be occurring in March 2024.

Training:

- January 14, 2024, the HR Director and all members of the Joint Health and Safety Committee (JHSC) participated in the JHSC training Part I and JHSC training Part II certification courses as well as a 4-hour Workplace Inspections training course on January 26, 2024.
- In February 2024, managers and supervisors were provided with a copy of the workplace inspection policy and procedures and forms during training in several management meetings

to ensure understanding of roles and responsibilities. Supervisors and managers confirmed attendance through signed training records.

- The Joint Health and Safety Committee tested the policy and procedure by completing inspections at each of the three sites, one in March, one in April and one in May 2024.

Associated evidence files: Certificates received by Joint Health and Safety representatives and the HR Director, February 15, 2024, memo, attendance records, dated agendas and portions of the minutes for meetings that showed the workplace inspection policy was discussed. A short video of one of the managers explaining to employees about workplace inspections and their importance is also provided. Copies of March, April and May inspections for each Joint Health and Safety Committee site. Copies of the completed inspection reports for March, April, and May for all 3 locations.

Check/Step 4:

- On June 15, 2024, an evaluation was conducted by the HR Director and documented on a form. The HR director reviewed all the Joint Health and Safety Committee inspections completed to date (March, April, and May). These were reviewed with the Chief Operating Officer to ensure the inspection schedule was being adhered to and that the process and tools outlined in the Workplace Inspection policy and procedure.
- Reviewed the procedure and confirmed that it contained all the topic requirements.
- They also confirmed that forms were being properly and completely filled in.
- When talking with the Joint Health and Safety Committee they stated that it took them much longer to do an inspection than they had initially thought and it was a very detailed process, but the checklists covered everything.
- Managers/Supervisors said they didn't have the time to get the recommendations completed in the timeframe outlined in the procedure.
- March's inspection found:
 - there was a problem with the ventilation in Building #1 and employees and building maintenance had not noticed it
- April's inspection found:
 - Lots of cords that were not taped down in Building #2 as well as a student was operating a forklift who had not gone through full training.
- May's inspection found:
 - a broken handrail on one of the stairs in Building #3
- After further review of the inspections a summary was documented which confirmed what senior management stated that they didn't address recommendations in the appropriate timeframe.
- It took the JHSC one month to get the recommended actions back to the supervisors, which was too long according to the procedure.

- The training records were reviewed and confirmed that all employees who are involved in workplace inspections have been trained in their roles and responsibilities.

Associated evidence files: Completed inspection reports. Recommendation report dated and signed by Chief Operating Officer. Email acknowledgement that each of the supervisors received the recommended actions to fix the problems identified during the inspection. Video of the Joint Health and Safety Committee doing an inspection of a machine.

Act/Step 5:

- We created a list of things we needed to fix when it needed to be done by and who was going to do it.
- In June 2024, the Workplace Inspection policy and procedure was revised so that:
 - The Health and Safety Director with assistance from the Joint Health and Safety Committee was responsible for summarizing the inspection reports and making recommendations to the senior leaders. The senior leaders would then review and have a chance to ask questions or comment on anything they felt was missing and when satisfied they would sign off.
 - The list of inspection items for monthly inspections would be grouped by similar hazards that relate to the physical space to make it easier to do checks and less time consuming.
- In June 2024, a pizza lunch celebrating “We made it through our first inspection” was provided at one of the buildings so everyone could be together and discuss the experience.
- A follow-up email to all staff from the HR Director:
 - thanking them for accommodating the inspection process
 - that changes had been made to the policy were made and what they were
 - where they could see the results of the latest inspections.

Associated evidence files: Approved revised workplace inspection policy and procedure, invitation to the pizza lunch, email from HR Director.