KELLER'S CONSTRUCTION TOOLBOX TALKS

How To Conduct A Toolbox Talk

Introduction

This section of Keller's Construction Toolbox Talks presents information and an overview to help you prepare and conduct toolbox talks at your worksites. The section provides a step-by-step checklist of what you must do to accomplish this task. With the help of the information and reproducible handout sheets provided in this manual, almost anyone is able to conduct a toolbox talk.

Preparing for the toolbox talk

Preparation is key to a successful toolbox talk. In this case, "success" is marked by a session that goes off well, with employees motivated and interested. Preparing for a toolbox talk presentation can be as elaborate or as brief as you choose, as can the talk itself. In general, a toolbox talk is defined as a short safety training meeting with employees, usually at the start of the shift, and usually including a one-page handout summarizing the safety information covered in the talk. Preparation for the toolbox talk consists of determining the following:

- Scheduling.
- Who to include.
- What information to cover.
- How to cover the information.
- The handout for the toolbox talk.
- Other materials for the toolbox talk.
- How you will document the toolbox talk.

Each of these steps is examined in greater detail here.

Scheduling your toolbox talks

Research conducted by J.J. Keller & Associates reveals that 87 percent of construction companies surveyed currently conduct toolbox talks. Of those, more than three-quarters do so weekly, while some companies conduct them as frequently as daily, and others conduct toolbox talks only monthly or quarterly.

The point is, you can conduct toolbox talks as frequently as you feel you have time to do so, and the session itself can last as long or as short as your schedule allows. But it helps to create a regular schedule of some sort, with frequency (once a week, month, year) and duration (usually between five and thirty minutes long).

Who to include

The next decision you need to make regarding your toolbox talks is who to include. This decision may be case-by-case, depending on the topic you are covering that session, or it may be that each supervisor prepares his own session for his group of employees, and everyone in the group attends.

However you conduct your talks, it is best to include only those employees who need the information. For example, for a talk on operating heavy machinery, you would probably only include operators, not everyone on the jobsite. But for a talk about working in areas where heavy equipment is operating, you may include many more workers from the site, perhaps even all of them, depending on who is working in the areas where heavy equipment operates.

NOTE: Remember that a toolbox talk does not substitute for more in-depth required training on specialized equipment or operations. A toolbox talk, by its very nature, is usually not detailed or of long enough duration to cover topics that require formal training sessions.

What information to cover

Next you must determine, for the topic at hand, what and how much information to cover during the short duration of your toolbox talk. Obviously, in five to fifteen minutes, you cannot cover all the relevant information on most topics. So you must prioritize the information to be covered. Information should be selected based on applicability to your company's particular worksite/environment and regulatory requirements.

You can use some of the information provided in this manual to help you determine this preparation step. Each topic covered in the Toolbox Talks Topic section has four pages of standardized information, the first two of which are intended for you, the safety supervisor or trainer. Those first two pages of each topic cover three particular categories of interest for the trainer that can help you in determining what information you should cover:

- Overview of the topic (a summary of what the topic is).
- Employee training (a summary of training requirements and/or suggestions).
- Training tips (which has a standard subsection entitled Where To Go For More Information).

How to cover the information

You also must determine how to cover the information you decide to cover. Ideally, you want to use examples, exercises, and real-life experiences to relate the information directly to the employee and make the session interesting and informative. In the two pages written for the supervisor for each topic, the third section mentioned, the training tips section, provides some examples of ways to train in a relevant way on the topic. Use the suggestions in the training tips section, as well as any other creative ways you can identify.

The handout for the toolbox talk

The handout for the session can take some time to prepare if you are starting from scratch. But in this manual, Keller's has provided a prepared handout ready for you to copy and distribute to all employees participating in the toolbox talk. The third page for every topic, labeled "handout" on the bottom of the page, is the handout for the topic. For some topics, there may be more than one handout.

You may not want to use the handout provided as is, it may not be specific enough to your operation, or you may want to include more details or company-specific information than is included for that particular topic in this manual's handout. You can always create your own handout, or you may want to add your own company-specific information to the handout provided here. You can take parts of the handouts in this manual and combine them with your own information to create a hybrid handout and still make your job easier.

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Other materials for the toolbox talk

In addition to the handouts, you may need to gather other materials for the toolbox talk. Such other training materials may include materials to be used in any demonstrations or exercises, or items you may want to give the employees to keep that are related to the toolbox talk topic, such as a set of earplugs, safety glasses (during a PPE toolbox talk), or locks and tags (for a lockout/tagout toolbox talk). Gather these and any other materials at least the day ahead of time, to ensure preparation. Some items you may need to order further ahead than that.

How will you document the toolbox talk?

You should document the toolbox talk as you would want to document any training session. Such documentation provides evidence to OSHA of good faith effort in your safety program in case of an inspection. It also provides a record of training in case of injury or lawsuit. To help such documentation, this manual provides a sign-off sheet for each topic's handout. The sign-off sheet for each topic is for you to use in documentation and recordkeeping of employee training on that particular topic with that particular handout. Each sign-off sheet is on the flip-side of the handout it goes with, lists the points covered in the particular handout for the topic, and is labeled "Sign-off Sheet" at the bottom of the page. This sheet may be copied to provide you with enough lines for all employees participating in training to sign it.

In addition to providing sign-off sheets for each topic, we are providing an Individual Training Log to be used to track each employee's training. Feel free to copy this log located on the next page.

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Individual Training Log

Use this log to keep records of the training for an individual employee. Fill in the trainee's name at the top. As the employee receives training, fill in the training topic, date, instructor's name, and location.

Employee: ____

Training Topic	Date	Instructor	Location

Training log sheets may be copied for you to use for recordkeeping purposes. Please refer to HOW TO USE THIS MANUAL for restrictions.

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Conducting the toolbox talk

If you use the preparation techniques described in this chapter, actually conducting the toolbox talk should not be too difficult. You will have all the necessary tools and materials already laid out for you. The tips offered have more to do with presentation techniques suitable to the adult working audience you are addressing. The following points will help you when conducting toolbox talks:

- Training techniques.
- Presentation techniques.
- Be aware of the group's reaction.

Training techniques

Toolbox talks build safety awareness, understanding of the OSHA rules, and a positive safety attitude. The primary purpose of such safety training is to have employees transfer the knowledge and safety skills to their everyday work on the job. Critical to this learning process is the way the training is prepared and presented. Three issues are examined regarding training techniques:

- Know your audience.
- Use adult training techniques.
- Vary training techniques.

Know your audience

When conducting toolbox talks, be aware of the characteristics of your audience. The typical group of construction workers is adult, predominantly male, and usually with a high school education level. These are factors you should take into account when considering the tone, vocabulary, and presentation methods to use when presenting your toolbox talks.

Consider various other characteristics of your workforce when determining these things, such as whether you have a high percentage of minority workers or employees who speak English as a second language, a higher percentage of women in your workforce, a very young or a very old group of workers. All of these things can influence the type of information you present and the way you present it.

Use adult training techniques

The construction workforce is an adult audience. Adults learn differently than children, and they draw best on their experience. That's why demonstrations and experiential learning work so well with this audience. In addition, you have to avoid the tendency to talk at them. Keep the sessions open and comfortable, with room for discussion, contribution of examples, and other types of input and interaction.

Vary training techniques

It is a good idea to use several different training techniques in the same or different toolbox talks to convey your point. Different people learn different ways. The use of various training techniques helps to assure that each person will understand the information presented and will be able to apply it to his or her job.

Retention of information increases through repetition and the use of multiple delivery methods. Research shows that for most people, only 10 percent of information is retained through reading alone, without any kind of reinforcement through other training techniques.

Using videos can help, because retention of information shown on video is between 25-30 percent. Add to that discussion and practice and retention levels increase to between 50 and 70 percent. Using multiple methods in the same training session will reinforce the information and aid in skill development. The following list is various types of training techniques that you can use:

1. Question and answer period.
2. Demonstration.
3. Discussion.
4. Simulation of a potentially dangerous situation and the proper and improper responses.
5. Drills or exercises in which everyone takes part.
6. Hands-on demonstration of safety equipment or devices.
7. Use of video and/or audio tapes.
8. Written materials and handouts.
9. Visual cues on blackboard or overhead projector.

Presentation techniques

Preparing yourself is as important as the planning and preparation of the materials. Here are some tips that should help trainers with varying backgrounds and levels of experience:

- Be prepared and enthusiastic.
- Start on time and end on time.
- Handle questions properly.

Be prepared & enthusiastic

Primary to accomplishing your goals will be your enthusiasm. Enthusiasm is contagious! You need to project your commitment, concern, and confidence in the safety program. If you cannot muster this type of enthusiasm for safety, then how can you expect employees to be interested in it.

In addition, not only do you want to appear prepared, you want to be prepared, from the way you are dressed (proper PPE and gear for the demonstration or topic at hand) to the technical details of any electronic or technical equipment you may be using as training aids. Get to the training site early to check on final details. You should assure that: equipment set-up is completed, and then gather and focus your thoughts prior to the employees' arrival.

Use the Toolbox Talk Checklist on the final page of this section to make sure all necessary items have been covered and ensure that you don't miss any program set-up steps.

Start on time and end on time

When you start late, you are training people to be late. You are also penalizing people who are on time. Running past the scheduled ending is also a problem; employees are usually being taken away from productive activities to attend safety toolbox talks. Often people's thoughts tend to drift as the session ending time passes and they gear up for their next activity. It is much better to finish early and spend the extra minutes in discussion or answering questions.

Handle questions properly

Questions come in two forms, those asked of you by trainees and those you ask the group you are training. Both types are useful in making sure the information you are trying to convey is being grasped and understood properly. When questions are asked, it is recommended you repeat the question in your own words prior to answering. This allows the whole group to hear the question, it allows you to clarify the question, and it gives you a few moments to formulate the answer. If a question is asked that you are covering later in the presentation, acknowledge that it is a good question and you will be covering the information later in the training. When you do cover the information, don't forget to check back with the questioner as to whether you fully answered his or her question.

Building questions into your presentation is a good method of involving the group. Questions can be used with the expectation of receiving an answer, or simply to get people to think in terms of application of the material being presented. When asking questions, don't ask in a leading fashion. Rather than using, "Don't you think...?" try "What would happen if...?"

Be aware of the group's reactions

Watching the group can tell you if they are bored, fatigued, or not understanding the material. It is your job to make sure trainees are not only receiving the information, but are understanding it, and are able to apply it to their job. Be ready to respond by changing a training technique if necessary to stimulate and communicate to your group.

Introduce each of the toolbox talks by explaining why you are doing the training, as well as how it applies to them. Imagine yourself as a member of the group being trained and introduce the program from their point of view. Why is it important to me? How is this going to affect me? What can I expect from this training?

Toolbox Talk Checklist

For preparation you should:

- ❑ Determine a regular schedule for toolbox talks.
- ❑ Determine who to include for this toolbox talk.
- ❑ Assess what information to cover.
- ❑ Decide how to cover the information.
- ❑ Make copies of the handout for the session.
- ❑ Gather other materials needed for the session.
- ❑ Bring copies of the sign-off sheet to use for documenting the session.

For training techniques you should:

- ❑ Know your audience.
- ❑ Use adult training techniques.
- ❑ Vary training techniques.

For presentation techniques you should:

- ❑ Be prepared and enthusiastic.
- ❑ Start on time and end on time.
- ❑ Handle questions properly.

Update and Refresher Training

Some OSHA standards require periodic or refresher training or retraining based upon observed employee behavior.

Indicators of a need for refresher training

Any incident that results in an injury, close call, or property damage maybe an indication that refresher training is needed. As the causes of the incident are determined, training needs can be identified.

This type of refresher training may only need to cover one or two specific points, but the training may be critical in preventing recurrences. Keep in mind that if one employee requires this training, that there are probably others who would benefit from it as well.

Procedures, equipment, and the physical plant undergo changes periodically. It is especially important to determine if any changes would make previous training obsolete or create new hazards that would require additional training.

Other refresher training considerations can be the complexity of the job and the frequency that employees perform a task. If complicated equipment or processes are used, more frequent refresher training might be called for. Also, if employees perform the task so seldomly that they may have forgotten the proper procedures since the last time they did the work, then you may want to train to refresh their memories.

Follow-up training

Follow-up training needs to highlight and summarize the important parts of the topic, and emphasize any changes that have occurred since the previous training was held. Follow-up training also offers an opportunity to introduce the group to more advanced material.

Training Challenges

Management buy-in

In order to establish an effective safety culture in any organization, management must be on board. If they are not, safety and health will compete with or take a second seat to business issues such as production and profitability, a battle which will almost always be lost.

Training programs take away from production time and can be costly. The better you are in convincing management of the need for the training program, the more likely you will be to receive adequate resources. To justify the training program:

- Outline the reasons for conducting the training,
- Identify the employees who need the training,
- Present a timeframe for the training program,

- Provide a cost estimate,
- Explain the training program's objectives and expected benefits, and
- Describe how you will be tracking the training's effectiveness.

Show management, in terms of dollars, of the direct and indirect costs of accidents and injuries and illnesses to the organization, along with the organizational costs, in terms of fear, lack of trust, feelings of being used, and so on, that can add to lost dollars in terms of lost productivity, poor performance, and lack of employee motivation.

Because losses due to accidents are bottom line costs to the organization, controlling these should more than pay for any needed changes when lost time, medical costs, costs for overtime or replacement workers, legal charges, and increased insurance charges are added up.

Help management to understand that when a safety program is successful it will go a long way in eliminating other organizational barriers such as fear and lack of trust that typically get in the way of any changes the organization wants to make.

Upper management must be willing to supply support by providing resources and holding managers and supervisors accountable for doing the same. The management and supervisory staff need to set the example and lead the way by supporting safety in the workplace. It's more about leadership than management.

Employee buy-in

Buy-in from the employee side for the needed changes will come as a result of building an alliance between the management, the union (if there is one), and the employees. The compelling reasons for the changes must be spelled out to everyone. People must understand why they are being asked to change what they normally do and what it will do for them if they are successful.

This has to be done up front. If people get wind that something is going to happen, and haven't been formally told anything, they naturally tend to resist and opt out. Give the work force plenty of notice about any changes, and then explain exactly what the changes will be and why the changes are being made.

Employee violations of safety rules

During training programs, employees should be taught the safety rules and it should be clearly explained that all employees are expected to follow those rules. While retraining should be considered when safety rules are not being followed, more training may not always be the right approach. In order to correct a problem of employees not following the safety rules, you must first understand their reasons for not following the rules.

You will usually find that the reason employees are not following the safety rules is one or more of the following:

- Safety equipment was not immediately available, did not work properly, did not fit, or they did not know how to use it.
- They were behind in their work.
- It was close to the end of their shift.
- Their supervisor does not encourage following the safety rules, or they thought no one was watching them at the time.
- They have seen other workers break the rules without getting into trouble.

There is a place for disciplinary action, and management should not hesitate to enforce safety rules just as they would enforce work rules for attendance, production, quality, and other issues. This is why management buy-in is so important for the overall success of the safety program.

Training illiterate employees

There are more and more employees who have poor reading skills or who are functionally illiterate, or who do not read English. This challenges trainers to provide training that is more heavily dependent upon pictures, graphics, and demonstrations than on the printed word.

For trainees who are illiterate, plan to schedule extra time to read through the materials with them.

Training non-English speaking employees

For training to be effective, training must be understood and implemented by the trainees. What happens, then, if the trainees don't speak your language? Statistically, an increasing percentage of employees speak a language other than English as a first language, and this percentage will increase as time goes on.

The injury rates for non-English speaking employees are statistically higher than for those who understand English.

Training Non-English-Speaking Employees

As a safety trainer, effective training is training that can be understood and implemented by trainees. However, what happens if your trainees don't speak your language? Increasingly, construction sites employ more and more employees who speak only foreign languages. In 1999, Hispanics, many of whom speak only Spanish, made up 15 percent of those in construction trades. That percentage was higher for construction laborers. These percentages are expected to grow. While many statistics focus on the Spanish-speaking workforce, a variety of native languages are found among employees: French, Italian, German, Portuguese, Polish, Russian, Chinese, Tagalog, Hmong, Korean, and Vietnamese.

Unfortunately, in construction the rate of injury and death for non-English-speaking employees is much higher than it is for those that understand English. According to U.S. Census data, between 1996 and 1998, there was a 40 percent increase in Hispanic fatalities in construction, with a less than 20 percent increase in the size of the Hispanic construction workforce.

OSHA's stance on language barriers

Employers and government agencies are beginning to realize that there is a language barrier that accounts for greater rates of injury and illness for those who do not understand English. In October 2000, OSHA and EPA signed a Memorandum of Understanding that commits the two agencies to promotion of environmental, safety, and health issues in the United States Hispanic community.

On August 3, 1999, OSHA published a letter of interpretation that attempted to clarify its stance on training those who do not speak English. Here is a portion of that letter:

> The instruction that employers must provide under §1926.21 must be tailored to the employees' language and level of education, the hazards its employees will encounter, and convey the required information. In short, we consider this standard to require ef-

> fective training. While it does not expressly require training that is interactive and hands-on, it is often more difficult to provide effective training that lacks these elements. In some cases it would be extremely difficult, if not impossible, to provide effective training in the absence of site-specific instruction, especially with respect to hazards such as confined spaces. Hands-on training may also be essential at times, especially when training on hazards associated with equipment. This provision does not expressly require formal testing, but we consider the standard to require employers to take reasonable steps to ascertain if the employees understand what they have been taught.

The bottom line is, no matter how construction employers accomplish the mission, OSHA will hold them responsible for training every employee at every jobsite regardless of their understanding of the English language. Employers must ensure that *each* employee:

- Recognizes and avoids unsafe conditions at their site,
- Understands the OSHA regulations applicable to their work environment, and
- Knows how to control or eliminate hazards and other exposure to illness or injury.

Solutions to the language barrier

One of the best solutions to ensure that your non-English-speaking employees understand the safety requirements, and can recognize hazards, is to hire a bilingual safety instructor. If that is not practical, interpreter assistance may prove helpful in getting the safety message across. Here are some tips on how to work with interpreters effectively:

- Ensure that interpreters are familiar with the subject,
- Insist on complete translations of the information,
- Ask your employees questions through the interpreter,
- Use techniques that provide true communication, and
- Try to anticipate potential training problems and address them before the training session. An example would be a problem with a direct translation for a term or concept.

Ideally, supervisors of non-English-speaking employees will be bilingual, allowing them to follow-up with employees after training and communicate with them on-the-job. Other employees can be quite helpful as well. Bilingual employees can pair-up with non-English-speaking employees to help them understand the safety training.

In cases where your employees are unable to read, you will need alternatives to written communication. Symbols and pictures are universal; everyone recognizes a "no smoking" symbol. Incorporate the use of safety signs at your worksites. Use symbols and graphics that will effectively send the message to an employee speaking any language.

Final thoughts on language barriers

Remember these tips in providing training for non-English-speaking employees:

1. Keep safety materials simple and avoid technical jargon.
2. Have relevant printed materials and safety videos in a second language for those who need it.
3. Use signs that include universal symbols and graphics to convey the message.
4. Encourage bilingual employees to help out with employees who are not fluent in English.

5. Offer incentives for supervisors to learn a second language.

Regardless of your approach to the language barrier, with some thoughtful planning it can be crossed. Good communication will ensure fewer accidents and safer working conditions.

Need help training your Spanish-speaking employees?

J. J. Keller & Associates has put together a companion manual to the *Construction Toolbox Talks*. This new manual has all the Toolbox Talks handouts translated into Spanish. These handouts are an effective way to train your Spanish-speaking employees. If you want to order this product, call 1-800-327-6868 and indicate you are interested in the *Construction Toolbox Talks* in Spanish.