



# Health and safety training and competencies

Guidance for Heads of School and Service

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## 1. Introduction: Health and safety training and competencies

This guidance suggests a way in which a Head of School/Service can ensure that the ‘Health and safety training and competencies’ Standard is achieved. Please discuss this document further with your Health and Safety Manager to facilitate the implementation of the Standard and identify the approach which best suits your needs.

## 2. Definitions

**What do we mean by “health and safety training”?** - Formal or informal mechanisms that enable University staff to acquire the health and safety knowledge and skills needed to fulfil their role. These can be provided centrally or locally.

- Formal health and safety training can include qualifications and accredited courses (e.g. CIEH/IOSH), approved e-learning modules, external training providers (e.g. PA testing) or specialist University staff (e.g. biological safety training modules available on VLE, laser safety training).
- Informal health and safety training mechanisms include equipment/area specific inductions, one-to-one health and safety coaching sessions, mentoring, on-the-job training.

**What do we mean by “health and safety competencies”?** - The ability of a person to apply health and safety skills, knowledge and training in the context of their role and/or activities.

**Health and safety development needs** - Where a person’s existing health and safety skills, behaviour or current experience do not match that of the requirements identified in the training matrix, and so extra training is required.

**External health and safety training providers** - Organisations or individuals who are not directly employed by the University but deliver health and safety training to University staff either on or off campus.

## 3. Roles and actions

The health and safety responsibilities of staff, students or visiting personnel are set out in the University Health and Safety Policy. For the management of health and safety training the role-holders listed below are included along with suggested actions. Whilst the itemised actions can be delegated, the responsibility for achieving them cannot be delegated and remains assigned to the relevant role-holder.

### Deans/ Heads of Service Group

- Determine at which level your training matrix needs to be produced and delegate production to the relevant management tier. This needs to cover your area, activities and staff roles and can either be at faculty/ service/ school/ team level, depending on the complexity of your area and your preferred option – ask your Health and Safety Manager for advice.

### Line managers or their delegated nominee (*usually a staff member with specialist knowledge*)

- Give new employees the HR induction checklist [which includes health and safety information](#); record completion on SAP.
- Record that staff have attended health and safety training.
- Assess whether staff have successfully applied (e.g. certificate or demonstration) their health and safety skills in the context of their role to ensure they match the requirements of their local training matrix.

### Training Manager for Wellbeing, Safety and Health

- Approves external health and safety training providers who deliver training to University staff in collaboration with Health and Safety Managers.

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## Health and Safety Managers

- Recommend the signing-off of Health and Safety Coordinators' health and safety competencies.

### 4. Time

Staff must be given adequate time within working hours to undertake training. Not all training means time out from the workplace. E-learning (via the University health and safety training and induction webpages or other sites) and the Virtual Learning Environment), health and safety mentoring, inductions, on-the-job training and in-house training are all valid mechanisms which do not require spending time out of the workplace. You can choose the method which best suits staff needs and situation with the support of your Health and Safety Manager.

### 5. Induction checklist

There is a Human Resources induction checklist for new employees on the HR website which includes critical health and safety information. This should form the basis from which staff will further develop their health and safety knowledge. It should be discussed with new employees in their first week of employment and the date of completion must be recorded in SAP.

### 6. Local training matrix

The role and activity-specific health and safety training requirements of your staff need to be identified in a training matrix. This training matrix can either be produced at faculty/ service/ school/ team level depending on the complexity of your area and your preferred option – ask your Health and Safety Manager for further advice. In practice a training matrix is also a useful tool when undertaking staff SRDS to ensure that any identified training needs are fulfilled and any extra training requirements are recognised and discussed.

### 7. Identifying staff health and safety training needs

Whilst there are a number of ways to develop a training matrix, one of the easiest ways is to:

- A. Adopt the University-produced central training matrix attached to this protocol. This sets out the University minimum health and safety training requirements for common staff categories such as new employees, Health and Safety Co-ordinators and line managers.
- B. Consider the roles and activities that people undertake, to identify any extra health and safety training requirements. You can often find these in the job descriptions. Generally the most valuable information on staff training needs comes from asking the staff themselves.
- C. Next you will need to consider any specific training requirements identified by local risk assessments, the University-produced health and safety protocols or legal requirements. Some staff may have specific health and safety roles, as identified in the health and safety protocols and so will need extra training. These roles include risk assessors, Display Screen Equipment assessors, Health and Safety Co-ordinators, Fire Warden, First Aiders, Events Organiser, etc. Older health and safety protocols will be refreshed on an ongoing basis to include any specific training requirements - ask your Health and Safety Manager for advice.
- D. Once you have collated all this information you can put it together as your local training matrix. For more examples see the health and safety website.

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## 8. Assessing health and safety competency

Once the training matrix has been produced an assessment can then take place which will enable line managers to identify where staff already have the necessary health and safety competencies and/or identify where additional training is required.

This assessment can happen in a number of ways: (this list is not exhaustive)

- Health and safety training courses:  
Some courses include a practical assessment of people's health and safety competencies (e.g. Fire Warden, First Aider, PA testing, Manual Handling Level 3). These courses can be delivered by Health and Safety Services or by an approved external training provider.
- An online training system: (e.g. Complywise, VLE)  
An online training system which uses tailored and interactive exercises to assess people's health and safety competencies.
- Line managers:  
Some health and safety skills (e.g. risk assessment) need to be assessed within the working environment in the context of a person's health and safety role. This assessment can be evidenced by a certificate (e.g. CIEH, IOSH) or a demonstration in which the person evidences their ability. Where line managers do not feel they have the knowledge or confidence to undertake such assessment it can be delegated to a trusted nominee. You may find it helpful to keep a record of the people nominated to assess different areas of health and safety competencies within your remit.

Examples of delegated nominees:

- Staff who have specialist skills (e.g. a colleague or a member of Health and Safety Services)
- Health and Safety Co-ordinators who have demonstrated the relevant health and safety skills
- Health and Safety Managers:  
Health and Safety Managers will recommend the signing-off of Health and Safety Co-ordinators' health and safety competencies to ensure that the core skills identified on the University-produced training matrix are performed to a suitable standard. Where Health and Safety Co-ordinators undertake additional and specific health and safety roles (e.g. PA Tester, First Aider) the assessment will be undertaken by a combination of Health and Safety Managers and locally delegated specialist staff. This will enable both the core and specialist health and safety skills to be assessed by the most appropriate person.

## 9. Recording health and safety training and competencies

This following information should be easily accessible and must be kept for a minimum of 3 years from leaving employment. Please consult relevant University protocols to check for specific data retention requirements (e.g. carcinogenic or teratogenic materials).

- Staff health and safety training:
  - Staff attendance at formal health and safety training must be recorded on SAP. Your local HR Co-ordinator has access to SAP and can help work out how best to upload this. Formal health and safety training includes qualifications (e.g. NEBOSH), accredited

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courses (e.g. CIEH/IOSH), sessions delivered either centrally or locally by University departments, e-learning modules provided centrally by Health and Safety Services, approved external training providers (e.g. PA testing) or specialist University staff (e.g. biological safety training modules available on VLE, laser safety training).

- The delivery of informal health and safety training to staff must be recorded either on SAP or on a local system/database. Informal health and safety training mechanisms include equipment/area-specific inductions, one-to-one health and safety coaching sessions, mentoring, on-the-job training, etc.
- Staff attainment of health and safety competencies:

Once staff have evidenced their health and safety competencies (e.g. a certificate from an accredited course, a demonstration) a record must be kept either on SAP or on a local system/database.

## 10. Health and safety training from external providers

There may be times when staff wish to use an external health and safety training provider, either on or off campus. Before this happens, the external training provider (along with the specific course they provide) need to be approved by a Health and Safety Manager or the Training Manager for Wellbeing Safety and Health.

To have an external training provider approved by Health and Safety Services please complete and return the 'External Training Provider Approval Form' to [safety@leeds.ac.uk](mailto:safety@leeds.ac.uk). We would recommend that the person requesting training discusses their needs with their line manager and then with their Health and Safety Manager or the Training Manager for Wellbeing Safety and Health (see the contacts page on the health and safety website for their details).

The form helps ensure staff receive training from reputable providers which follows a structured and logical training plan. This does not include suppliers who provide operating instructions as part of the installation of new equipment or training that supports students' programmes. This process helps us stop duplication, identifies cross-campus training needs and checks whether training can be provided internally.

We will aim to provide this approval within two weeks. Once the provider is approved, they can be used again to deliver the specific training for which they were approved so long as their public liability insurance is still valid.

The University runs a wide range of courses for staff at all levels. These are tailored to fit with the University health and safety protocols. Health and Safety Managers can also provide health and safety training (e.g. briefing, courses, mentoring, etc.) tailored to the specific needs of the areas for which they are responsible.

If there are any topics for which you would like specific training please contact your Health and Safety Manager or the Training Manager for Wellbeing Safety and Health. If your training need is common to other areas, we may be interested in advertising it centrally so that staff from other departments can attend.

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