



Hiring an Occupational Health and Safety Consultant

October 2019



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This guide has been developed to assist organizations in their decision-making process when hiring Occupational Health and Safety (OHS) consultants. The aim of this document is to highlight the key skills that should be assessed and to provide organizations with tips to guide them in determining the abilities of the consultant.

Introduction

As independent agents, consultants help provide objective, unbiased advice. They bring competence and expertise in their field as a result of experience with varied sectors and clients, and having dealt with multifaceted issues. Thus, they have a broader prospective and bring in new ideas and industry best practices (value addition to the organization). However, hiring a consultant should be a wise investment. Hence, the organization should be prepared to find the right consultant for the job. It is recommended to look for an individual with the right mix of experience, education and skills pertaining to an organization's needs.

Knowledge and Experience

- Formal education or training in the Occupational Health & Safety (OHS) fields. When hiring a consultant, the organization should be aware of specific needs for safety, health or both.
- Generic experience in the appropriate OHS field - in development of OHS programs, safety or health management systems
- Specialized Experience:
 - Industry-specific experience - Experience in your industry sector will enhance the ability to understand associated hazards and risk controls.
 - Discipline-specific experience - OHS is a vast field including many specialized areas, such as fire prevention/protection systems, ergonomics, investigations, audits, software development, health and wellness. In certain situations, it may be beneficial to look for experience relevant to your organization's requirement.
 - *Occupational safety:*
 - Technical knowledge to understand, identify and assess industry-specific hazards and risk, and to problem-solve for viable control solutions and recommendations
 - Understanding of the Workplace Safety and Health Act and Regulation, its limitations and its application in varying situations



- *Occupational safety (continued):*
 - Understanding of workplace injury, illness and demographics in order to build initiatives designed to eliminate or correct identified hazards
 - Ability to design and/or implement an OHS management strategy and framework for OHS critical risk control management
 - Experience in communication with a wide range of people - middle management to floor supervisors to senior management - building relationships as a basis for mentoring, influencing and providing technical and strategic advice
 - Ability to develop and support management in monitoring and compliance efforts
 - Capacity to support a safe working environment by maintaining administrative processes, conducting training and using state-of-the-art tools, processes and solutions based on standards of practice
 - Ability to/experience with auditing a safety and health program audit
 - Knowledge of investigative techniques
- *Occupational health:*
 - health-related orders - carrying out a prescribed assessment, carrying out an evaluation pursuant to a workers compensation claim, responding to questions of compliance
 - health-based work refusals or effects where symptoms are reported
 - health-based audits
 - project design involving anticipation or recognition of risks - purchase reviews, process review, contaminants and exposures
 - addressing worker exposures - new materials/contaminants, materials without exposure limits, multiple contaminants, materials with varying exposures
 - serious contaminants with irreversible effects - carcinogens, mutagens, reproductive agents and sensitizers





- *Ergonomics:*

- Comprehensive knowledge of the biomechanics of the human body, and the impact of working postures, force, repetition and other hazards on musculoskeletal well-being
- Knowledge and experience in assessing the interaction of the human body, the task, the tools of the task and the environment - what is ideal and how one recognizes and measures increased risk
- Working knowledge and understanding of commonly used ergonomic assessment tools
- Ability to help organizations identify ergonomic hazards and assess associated risks, proposing solutions and controlling those risks.
- Ability to advise organizations on preventing work-related musculoskeletal injuries and devising/ implementing related programs
- The ability to assist management in the implementation and monitoring of proposed solutions
- Develop and support management in the design and maintenance of monitoring system(s) to ensure ongoing compliance.

- **Knowledge of applicable legal requirements**

- In-depth knowledge of OHS principles and safety management systems, such as CSA Z1000, ISO 45001
- Knowledge of the CSA standards that govern ergonomics: Ergonomics CSA Z1004 and Office Ergonomics CSA-Z412-17
- Having certification that is appropriate to your needs. Certification enhances the credibility of the consultant –reflecting qualifications, knowledge level and relevant experience.
 - For safety needs, certifications such as Canadian Registered Safety Professional (CRSP), Certified Health and Safety Consultant (CHSC), or designations such as National Construction Safety Officer (NCSO), Gold Seal Certified Construction Safety Coordinator (GSC-CSC) are recommended.
 - For health needs, certifications such as Registered Occupational Hygienist (ROH), Registered Occupational Hygiene Technologist or Certified Industrial Hygienist, are recommended.
 - For ergonomic needs, many practitioners come from a background in rehabilitation sciences (occupational therapy, physiotherapy, kinesiology, chiropractic medicine, athletic therapy) but depending on the goals of the consultation, some certification in ergonomics may be desired. Certified Ergonomics Specialist (CES) and Certified Ergonomics Evaluation Specialist (CEES) are two examples of practitioner designations. Canadian Certified Professional Ergonomist (CCPE) and Board Certified Professional Ergonomist (BCPE) are designations for professionals who can provide ergonomic services at different levels of complexity.

Skills and Ability

- Diagnostic ability/problem-solving skills - look for the ability to deal with situations similar to yours and in a company size comparable to yours
- Inductive reasoning - ability to induce a general conclusion from a set of specific facts
- Ability to provide effective and efficient business practices/solutions that enhance the quality of service provided
- Clear and effective communication skills - listening, observing, writing and oral presentation
- Sound interpersonal skills - promote customer relations
- Ability to tailor their recommendations to your needs - look at their previous consultation to determine if they provide generic or customized (and sustainable) solutions
- Teaching/coaching skills - ability to communicate simply and effectively, facilitate transfer of knowledge and tools to the client organization to promote self-sufficiency and enable the organization to deal with similar challenges in the future.

Guiding Tips

- Preparation is the key.
 - Define your project or task goals and requirements.
 - Define your need (type of consultation): looking for an advisor (to guide you through the process) or just looking to outsource your work?
 - Define your timelines and budget.
- **State your expectations** clearly to the consultant. Discuss specific needs, services provided, scope of work, methodology, deliverables, timelines and associated costs.
- Request previous client results and work - this will assist you in determining how successful their previous consultations were and will also help determine the level of client service.
- Contact references to verify their experience - this will also help you understand why they chose this consultant and the experience they had during the consulting engagement.
- Confirm if any followup services are provided by the consultant - is any advice on implementation of the recommended solution provided, or will you have to hire another consultant to implement those recommendations?
- Schedule a meeting or an interview with the consultant. It will provide you with an opportunity to meet the consultant in person and assess the consultant's abilities, skills and knowledge. Some sample interview questions have been provided on subsequent pages for reference.
- During your initial discussion with the consultant, look for the consultant to ask high-quality questions. A good consultant is likely to ask pertinent questions about the task and offer new ideas/methodologies to resolve the situation.
- A consultant should work with you to make a system effective for you - the consultant should ask the right questions, develop documents with your input, make recommendations that are suitable to your organization, and promote the sustainable independence of the program.

Conclusion

Having clarity of your expectations and stating them clearly to the consultant will be beneficial for both parties and result in a successful engagement. Good consultants will use their knowledge and expertise to provide guidance and recommendations/solutions tailored to your specific needs.

Although these guidelines are not a guarantee of the future performance of a consultant or consulting engagement, they will help you determine a consultant's ability to deliver results for your organization.

Sample Interview Questions

Here are some questions to pose to potential consultants. Look for the consultant to provide answers similar to those suggested below:

1. **Have you had experience developing a new safety and health program? How did you ensure the program was effective?**

In order for the safety program to be effective, it should be developed with input from employees and management. Leadership support is crucial. The program should be actively practised on a daily basis, should be intrinsic to the organization and should incorporate customized ways to control hazards and risks. For continuous effectiveness, the program must be dynamic (change along with changes in the workplace). It is important to work closely with various departments in the organization to identify practical ways of incorporating safety metrics/elements into the pre-existing operations program.

2. **What strategies have you used in the past to get employee buy-in on your safety and health program? How can you keep employees engaged in the program?**

- Emphasize the shared responsibility of employees and management – recognize the employees' role in creating a safer workplace, making them feel valued.
- Encourage employee input and collaboration – consider employees' suggestions when developing the program (e.g. safe work procedures, training modules) and making OHS-related decisions.
- Encourage open/positive communication in the organization – enhance awareness, keep employees informed of upcoming changes, encourage them to suggest ideas for effective change management.
- Encourage employee ownership – reward and recognize suggestions.

3. **What are the key considerations when developing and implementing a safety training program? Please explain based on your experience.**

- Conducting a NEEDS analysis – reviewing historical data such as previous training, past inspections and incident reports, reviewing previous feedback and gathering information through surveys
- Setting SMART objectives and LEARNING OUTCOMES
- Developing the CONTENT in collaboration with employees and management
- Incorporating DELIVERY METHODS suited to the needs of the workers (knowing your audience)
- Identifying the EVALUATION process to determine effectiveness and identify gaps for continuous improvement of the program.

4. **What would you suggest an organization do to continuously improve its safety and health program?**

Aim for safety performance rather than just being compliance oriented. Use a PDCA approach. Set up SMART objectives, periodically measuring and evaluating the program (using leading/lagging indicators). Identify gaps and create an action plan to close gaps. Assign accountabilities. Complete and follow up on actions to determine effectiveness. Top-down support and bottom-up involvement are vital to the enhancement of a safety culture.



5. What key performance indicators (KPI) have you used in the past that you feel have proved to be most beneficial in strengthening the overall safety and health management system?

Using a combination of leading indicators, such as number of inspections, number of audits, amount of hazard/concern reporting etc. (that focus on being proactive rather than reactive, drive safety performance and continual improvement) and lagging indicators such as incident rate, days lost and improvement orders (this is a traditional approach – these indicators show progress towards compliance).

6. What experience do you have conducting audits or program assessments? How do you think they are useful for an organization (or how was the information gathered during the audits used)?

The consultant should discuss various methodologies (such as documentation review, interviews etc.) used during the audits/assessments to gather information, various audit standards or instruments (such as CSA Z1000, ISO 45001). The consultant should be able to elaborate on the audit deliverables and the additional value they brought to the client. Some potential benefits of conducting audits/assessments are as follows:

- provides a framework and benchmark for the organization
- assists in goal/objective-setting and performance evaluation
- assists in directing efforts and resources toward areas needing improvement, thus facilitating optimized use of resources
- leads to positive changes and continual improvements in the safety program.

7. What would you do to ensure the solutions you provide produce the desired results?

The solutions provided are customized for the organization and are not from the Internet or a general package. Taking into account the internal factors, incorporating input (suggestions) from and working collaboratively with the client (management, committee members, workers, etc.), looking at the history of the organization to determine what works well for them and what doesn't, helps create practical and optimized solutions that are likely to be effective. Providing continual support and facilitating transfer of knowledge/tools to the client further promotes sustainable independence of the program.

References

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