

HSE Better Backs 2006: Worker involvement evaluation

Research with Unite Amicus safety representatives

Prepared by **Opinion Leader Research**
for the Health and Safety Executive 2007

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This report covers the findings of a project which gathered evidence about the effectiveness of Unite Amicus union safety representatives in delivering HSE campaigns in the workplace. The project took the form of three distinct phases running from January 2006 to February 2007 using both quantitative and qualitative research techniques. The findings provide strong evidence that promoting HSE initiatives via Unite Amicus training courses is an effective way of enabling and encouraging representatives to take action in the workplace. The research also highlighted the range of variables that impact the extent to which a rep took action and the extent to which their actions impacted on the wider workplace. In addition the research found that although back safety is already an important issue that is well controlled for a number of workplaces, the training still benefited these workplaces by exposing representatives to new ideas on how to manage the risks around back safety, and for some it has raised the issue of back safety up the H&S agenda.

This research was commissioned by COI on behalf of HSE. This report and the work it describes were funded by the Health and Safety Executive (HSE). Its contents, including any opinions and/or conclusions expressed, are those of the author alone and do not necessarily reflect HSE policy.

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1. EXECUTIVE SUMMARY

In December 2005 the COI commissioned Opinion Leader to run a project on behalf of the HSE to evaluate whether promoting HSE campaigns at Unite Amicus safety representative training courses is an effective way of encouraging representatives to take action in the workplace. The purpose of the project was to gather evidence about the effectiveness of union safety representatives in delivering HSE campaigns in the workplace.

The project took the form of three distinct phases running from January 2006 to February 2007 using both quantitative and qualitative research techniques.

Phase 1: The objective of phase 1 was to collect a baseline of demographic information on the safety representatives and to gauge their initial reaction to the Backs! training whilst understanding their intentions of what action they think they will take as a result of the training. A paper questionnaire was given out to every Unite Amicus safety rep attending an Unite Amicus H&S training course between January – September 2006 and a total of 676 completed questionnaires were received and analysed.

Phase 2: The specific objective of phase 2 was to understand the extent to which safety representatives take up and implement Backs! 2006 in their workplace. Approximately 3 months after attending the training course representatives completed either a paper based questionnaire or a short telephone interview. In total 200 questionnaires were completed and analysed. In addition to the quantitative questionnaire, 20 depth interviews carried out via the telephone were completed with a selection of representatives to qualitatively explore the issues in more depth.

Phase 3: Phase 3 of the project was designed to explore the factors that influence the safety representatives' effectiveness in the workplace and was a purely qualitative phase involving 9 workplace case studies. The workplace case studies took a 360 degree view of the workplace covering the safety rep, the employer and employees.

The quantitative results from phase 1 and phase 2 indicated that the Backs! 2006 training has had a positive impact on encouraging representatives to take action in their workplace.

- Representatives gave a high average rating for usefulness of 7.7 out of 10 with nearly a fifth (19%) giving a rating of 10 out of 10 for usefulness
- Training had given representatives both the confidence and information needed to assess risk and promote safe manual handling practices and the materials provided during the course made it easier for nearly 3 out of 4 representatives to promote their safety campaigns in their workplace
- 59% of representatives increased the frequency with which they raise back safety issues with their colleagues since receiving the training and 29% increased the amount they raise back safety with senior management
- Within three months of attending the training course around half the representatives had already raised awareness of back safety issues among work colleagues, been involved in a workplace safety assessment and distributed and/or put up back safety information in the workplace

- Many stated that they still plan to take further actions in the future with 48% of representatives stating they still intend to be involved in a workplace safety assessment using the MAC tool
- Although it is not possible to conclusively attribute all actions taken by the representatives as being a direct result of receiving the Backs! training; when openly asked 44% stated they would not have taken any actions if they hadn't received training on Backs! 2006 and 33% say that they would have taken only some of the actions if they had not received the training.

Encouragingly, a number of representatives had already seen initiatives implemented in their workplaces as a result of the actions they had taken since receiving the training, just three months after attending the course.

- Of the 24% of representatives who put forward buying new handling aids to avoid manual handling to their safety committee/senior management, 100% of these had seen new handling aids bought
- Of the 29% of all representatives who had put forward new or updating existing training programmes around manual handling techniques, 93% had seen this implemented.

Analysis of the quantitative findings from phase 1 and 2 was inconclusive in terms of being able to draw out the variables that determine whether or not a rep took action in the workplace. However, the findings from phase 3 do highlight some of the variables that seem to impact on a safety rep's ability to promote back safety and instigate changes around back safety within their workplace.

Relevance to the workplace - Although relevance to the workplace did not come up in the quantitative phase as a significant factor that impacts whether a rep had taken action or not in the quantitative phase, the phase 3 case studies highlighted that the relevance of back safety to their workplace environment was significant in determining whether the safety rep actively promoted the campaign.

Seniority, profile and experience of the safety rep also impacted on their ability to and confidence in suggesting changes to senior management.

The corporate structure of an organisation has implications for the safety rep in terms of their motivation to promote campaigns and initiatives. Where there is a centralised corporate structure with a central H&S function, it tends to be that the central function leads on new initiatives. This may result in the Unite Amicus safety rep being reactive rather than proactive as this is all that is required of their role in these types of organisations.

To conclude, both the quantitative and qualitative findings provide strong evidence that promoting HSE initiatives via Unite Amicus training courses is an effective way of enabling and encouraging representatives to take action in the workplace. The qualitative research findings highlight the range of variables that impact the extent to which a rep took action and the extent to which their actions impacted on the wider workplace. The research has also highlighted that although back safety is already an important issue that is well controlled for a number of workplaces, the training still benefited these workplaces by exposing representatives to new ideas on how to manage the risks around back safety, and for some it has raised the issue of back safety up the H&S agenda.

Considerations for future initiatives:

Targeted communications campaigns: - there is the potential for the HSE to target who it communicates with to maximise the impact of its campaign. So more senior representatives with high visibility in their workplace may take more action than those who are less confident and proactive so the HSE may choose to prioritise communications with these representatives. Those representatives who work in an environment where back safety is already well controlled may be looking particularly for new innovative ways of doing things, in which case the HSE may choose to tailor its communications with these representatives to reflect their interests.

Practical advice for taking action - some representatives suggested giving more practical advice about how to take action in the workplace as part of the training. This is relevant to representatives who were lacking profile and confidence in their role. This might include advice about how to communicate initiatives to a wider audience and how to persuade senior management to take action.

2. INTRODUCTION

2.1 BACKGROUND & OBJECTIVES

The HSE believes effective worker involvement and consultation on health and safety has a positive impact on both individual workers and organisations as a whole. There is a growing body of evidence to support this view which shows that worker involvement helps to reduce workplace injuries and ill health, sickness absence, and can increase productivity and reduce staff turnover.

The HSE Worker Involvement Programme supports trade union health and safety representatives and considers them an important way of involving workers in health & safety management. The programme is committed to engaging health and safety representatives with HSE programmes and is now seeking to ascertain whether this improves the results of HSE campaigns.

Unite Amicus is the UK's largest manufacturing, technical & skilled persons' union. It has over 1.2m members in the private & public sectors. Unite Amicus believes everyone has the right to work in a healthy, safe environment; to this end, Unite Amicus offers the latest training, information and advice to representatives, members and employers

The Unite Amicus HSE Worker Involvement Programme initiative provides training and materials on HSE's MSD/Backs! campaign to Unite Amicus safety representatives. It aims to encourage the representatives to take this learning back to their workplaces and promote action to address MSD/Backs! risks. Part of the Worker Involvement Programme's remit is to evaluate the effectiveness of this approach in promoting action on specific health and safety issues. The results of this evaluation will then be used to inform future HSE campaigns.

Two key campaigns were promoted on the Unite Amicus health and safety training courses during 2006:

- HSE Backs! (on musculoskeletal disorders)
 - The overall aim of Backs! is to promote the use of lifting and handling aids as a means of reducing the incidence of back injuries at work
- AND literature and a CD-ROM on the use of HSE's manual handling assessment ('MAC') tool in manual handling risk assessments
 - The tool helps to identify high risk workplace manual handling activities, assess the risks posed by lifting, carrying and team manual handling activities
 - It is designed to help people understand, interpret and categorise the level of risk of the various known risk factors associated with manual handling activities
 - The MAC tool incorporates a numerical and a colour coding score system to highlight high risk manual handling tasks

The stated aims of this project were:

- To analyse whether promoting HSE campaigns at Unite Amicus safety representative training courses is an effective way of encouraging reps to take action in the workplace
- To gather evidence about the effectiveness of union safety reps in delivering HSE campaigns

There was no objective to evaluate the quality of the training given or the materials provided. Any reference to the quality of the training course was only used in relation to answering the two core stated aims of this project as outlined above.

2.2 METHODOLOGY

The research took place over the course of 14 months and consisted of 3 distinct phases.

Phase 1: objectives and methodology

The specific objectives of phase 1 of the evaluation research were:

- To obtain a baseline of demographic information on the safety reps
- To gauge their initial reaction to the Backs! training and understand their intentions of what action they think they will take as a result of the training

A paper questionnaire was given out to every Unite Amicus safety rep attending an Unite Amicus H&S training course between January – September 2006 (see appendix to view full questionnaire). 676 completed questionnaires were received and analysed.

Phase 2: objectives and methodology

The specific objective of phase 2 was:

- To understand the extent to which safety representatives take up and implement Backs! 2006 in their workplace

Approximately 3 months after attending the training course reps completed either a paper based questionnaire or a short telephone interview. In total 200 questionnaires were completed and analysed. In addition to the quantitative questionnaire, 20 tele-depth interviews were completed with a selection of reps to qualitatively explore the issues in more depth. Reps were purposefully recruited for the tele-depths to ensure a mix of reps that had taken action and those that had not, were included.

Phase 3: objectives and methodology

The specific objective of phase 3 was:

- To explore the factors that influence the safety reps' effectiveness in the workplace

Phase 2 was a purely qualitative phase involving 9 workplace case studies. The workplace case studies involved:

- Face-to-face depth interviews with the safety rep
- A depth with the employer
- A small group with employees in each workplace

No strict demographic quotas were set but a cross section of workplaces of different sizes, levels of risk of back pain and levels of control of back pain were recruited.

3. MAIN FINDINGS: PHASE 1 & 2

3.1 RISK AND CONTROL OF RISK OF BACK PAIN

Understanding the safety reps' perceptions of the risk of back pain in their workplace and how well they perceive that risk to be controlled provides important context to the research. The phase 1 questionnaire collected this information.

Figure 1 below shows that 43% of reps in the phase 1 sample perceive the risk of back pain in their workplace to be very high/high and 66% consider it to be adequately controlled/well controlled/very well controlled (see Figure 2). The figures for the phase 2 sample are broadly representative in terms of the reps' perceptions of the risk of back pain, with 41% stating they think the risk is very high/high. However, a higher percentage of the phase 2 sample perceive the control of the risk of back pain to be adequately controlled/well controlled/very well with 73% giving this response compared to 66% in the phase 1 sample.

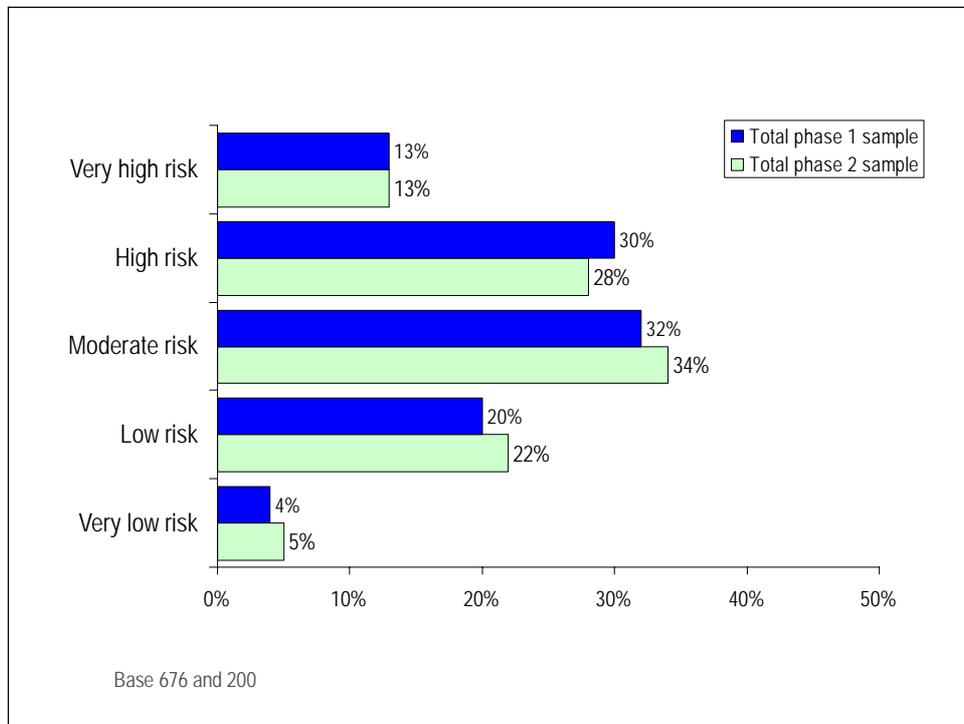


Figure 1 Phase 1 and phase 2 samples by risk of back pain in the workplace

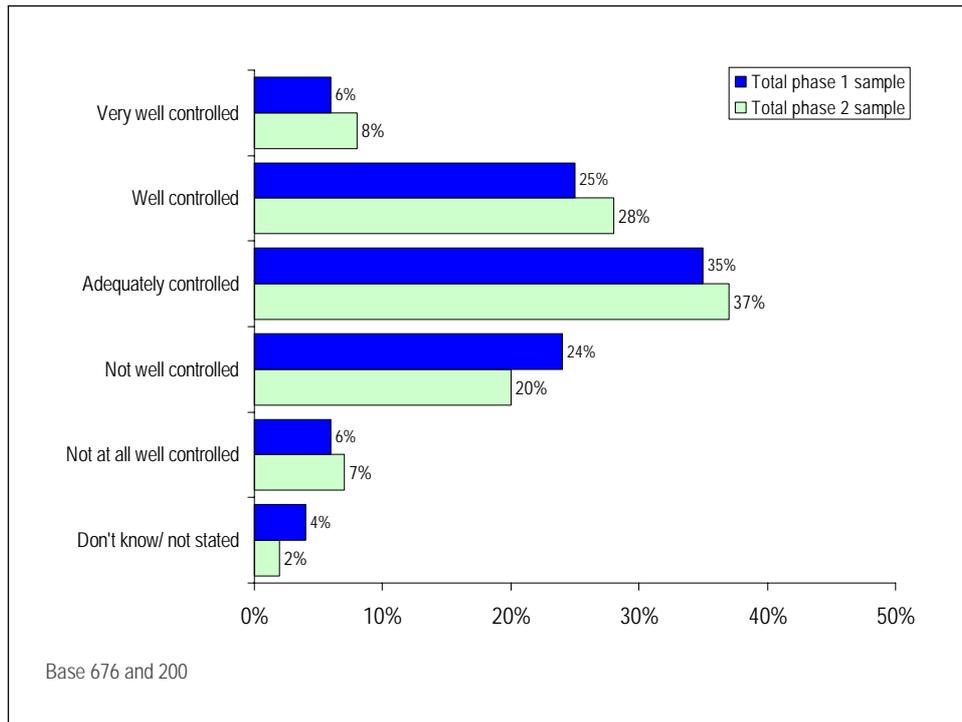


Figure 2 Phase 1 and phase 2 samples by control of risk of back pain

Figure 3 below shows that among reps who perceive the risk of back pain in their workplace to be high or very high, 35% in phase 1 and 37% in phase 2 feel that the risk is not well controlled/not at all well controlled. This is higher than the percentages that feel it is well/very well controlled – 29% in both phase 1 and phase 2. This shows that there are a number of workplaces within the sample where the potential need for action around back pain is high.

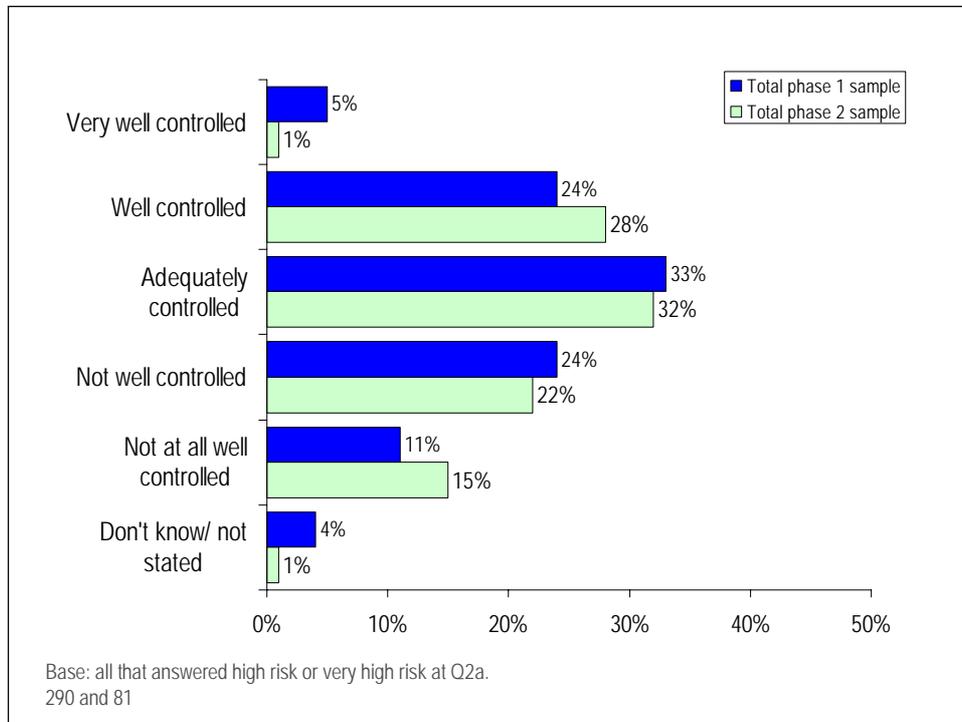


Figure 3 The control of risk of back pain among those who perceive the risk of back pain in their workplace to be high/very high

Figure 4 below shows that among those that perceive the risk of back pain in the workplace to be low/very low, there are about a quarter of reps in low risk workplaces that consider the risk to be not well controlled/not at all well controlled – 29% phase 1 and 25% phase 2 – showing that even among lower risk workplaces there is still opportunity for improvements around back safety.

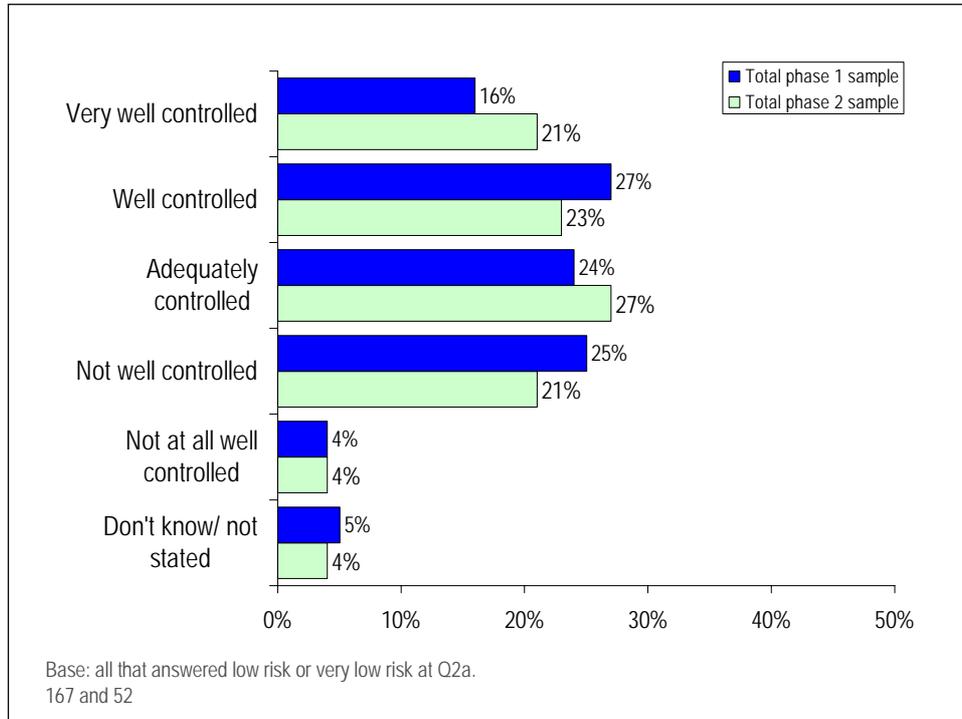


Figure 4 The control of risk of back pain among those who perceive the risk of back pain in their workplace to be high/very high

3.2 USEFULNESS OF BACKS!

Most reps found Backs! 2006 useful in helping them promote safety in their workplace. 87% rated Backs! between 7-10 in usefulness three months after attending the course and the average rating is 7.7 out of 10. Top scores have decreased slightly since reps gave an initial rating immediately after attending the course but a high number of reps still gave a very high rating for usefulness of 9 or 10 out of 10.

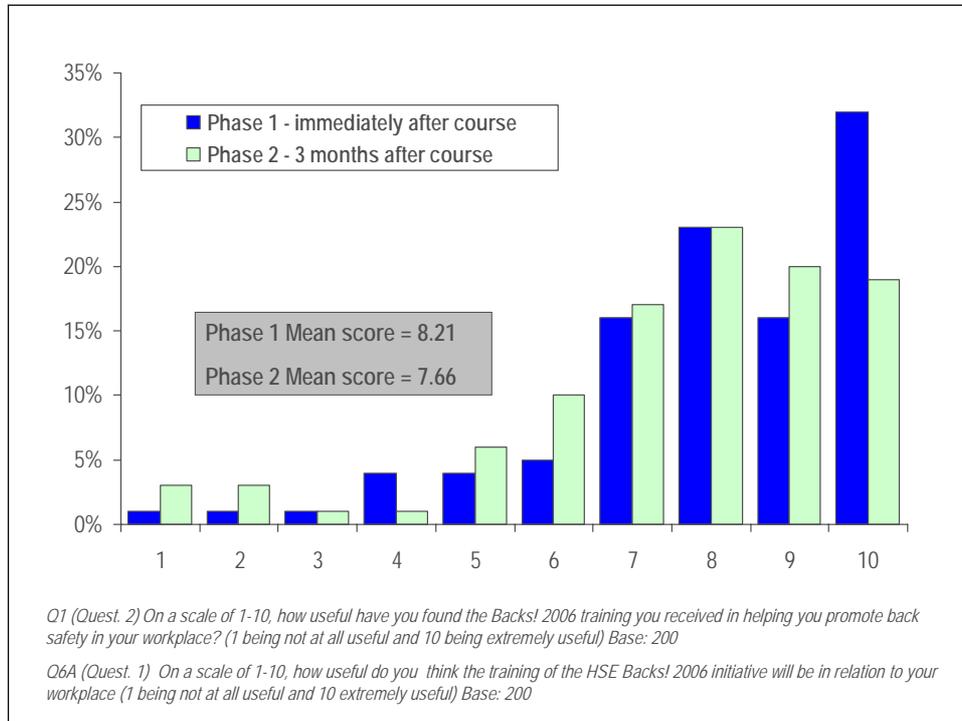


Figure 5 Rating of the usefulness of Backs! training in helping to promote back safety in the workplace

The phase 1 questionnaire asked reps to spontaneously cite what they thought were the most useful aspects of the training course. Figure 6 below shows that the manual handling/lifting techniques and colour coded charts were thought to be the most useful aspects of the training course followed by the MAC tool and risk assessment.

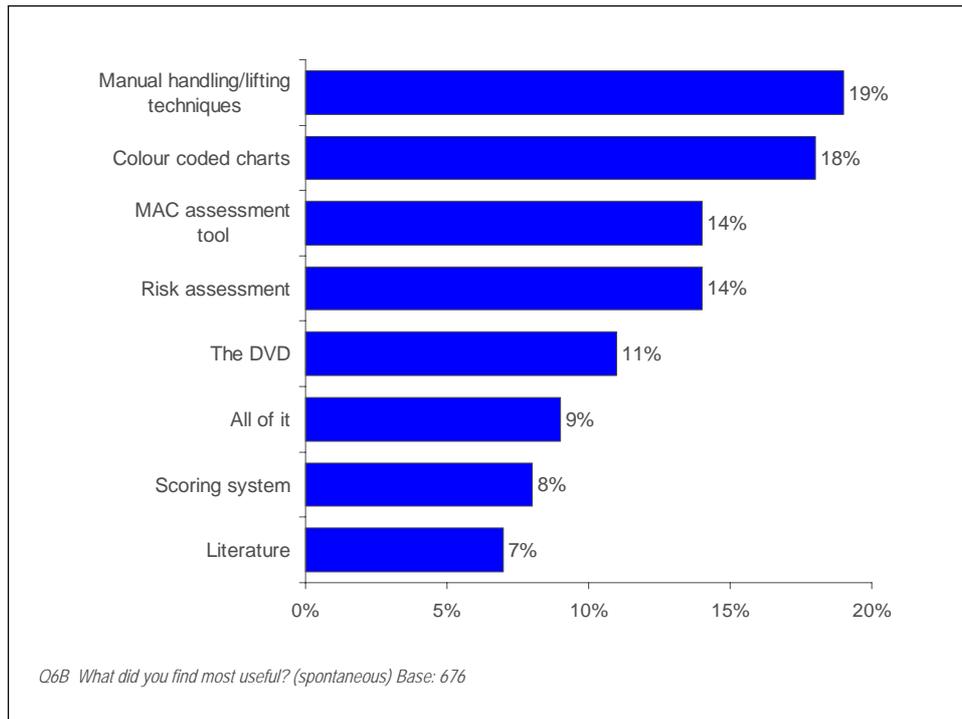


Figure 6 The most useful aspects of the Backs! training (Phase 1 questionnaire and base) – Spontaneous question

When asked about the impact the Backs! training has had on their ability to promote back safety in the workplace:

- 78% agree that the Backs! 2006 training provided them with the information needed to assess risk and promote safe manual handling practices
- 72% agree that the Backs! 2006 training provided them with greater confidence in assessing risk and promoting safe manual handling practices
- 47% agree that the Backs! 2006 training provided them with greater authority in assessing risk and promoting safe manual handling practices

When asked about the accompanying materials for the training, the colour booklet was used by most of the reps (57%) as was the risk assessment chart (52%) and about a third (34%) had used the DVD. However, just under a quarter of the safety reps (23%) have not made use of any of the accompanying materials.

The qualitative work explored in more detail why some of the reps had not used the materials and for some it was a practical issue, for example where there was no DVD player available on site, or they had not found the time since the course to review the material but may have intended to go back to it in the future.

The quantitative findings also indicate that where risk is perceived to be well/very well controlled, it is more likely that the reps won't have used the materials – 25% of those in well/very well controlled risk workplace had not used any of the materials compared to 17% of those in a workplace where the risk is perceived to be not well controlled/not at all well controlled.

Of those who have used the materials, most (71%) found the accompanying materials made it easier to promote their back safety campaigns.

3.3 ACTIONS TAKEN

The phase 2 questionnaire explored in detail what actions the safety reps have taken since completing the training course. It asked about actions they have already taken and those they still plan to take in the future, as well as asking about initiatives they have recommended to their safety committees or senior management. The phase 2 data has also been compared to the phase 1 data regarding their immediate intentions for taking action relating to the risk of back pain in their workplace after attending the course.

Immediately after attending the Unite Amicus training course 89% of the reps said that they were planning to promote Backs! in their workplace. 3 in 10 (30%) spontaneously stated that they would talk to colleagues/ employees to make them aware of back safety issues and nearly 2 in 10 spontaneously said they would speak to their management about back safety. 93% of the reps who said they would take action envisaged doing so within 3 months.

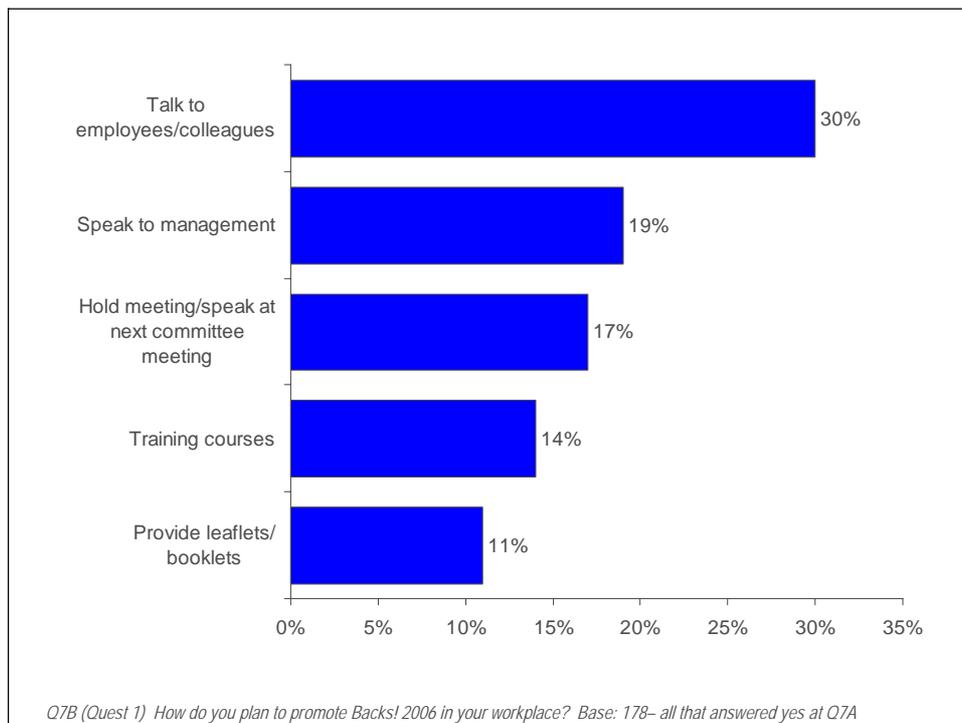


Figure 7 Immediate post course intentions

As Figure 7 above highlights, one important aspect of reps taking action in the workplace is to raise general awareness of back safety issues. Figure 8 below shows that 3 months after attending the course nearly 6 in 10 reps (59%) have increased the frequency in which they raise back safety issues with colleagues, 4 in 10 (43%) have increased the amount they raise back safety with middle management and nearly 3 in 10 (29%) have increased the frequency in which they raise it with senior management.

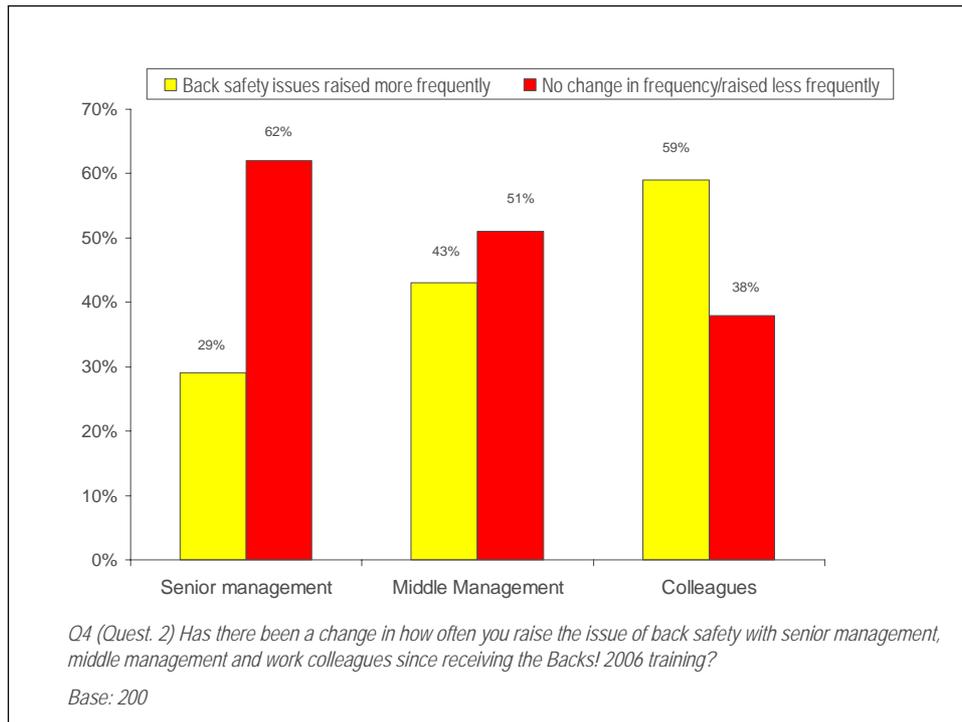


Figure 8 Change in the frequency that reps are raising back safety issues within their workplace

Figure 9 below shows that 71% of reps had already taken action 3 months after attending the course by raising awareness of back safety among colleagues. Over half (55%) had already been involved in a workplace safety assessment and just under half (49%) have distributed and/or put up safety information relating to back safety in the workplace. Encouragingly, many still plan to take action in the future, with 48% of reps stating they still plan to be involved in a workplace safety assessment using the MAC tool.

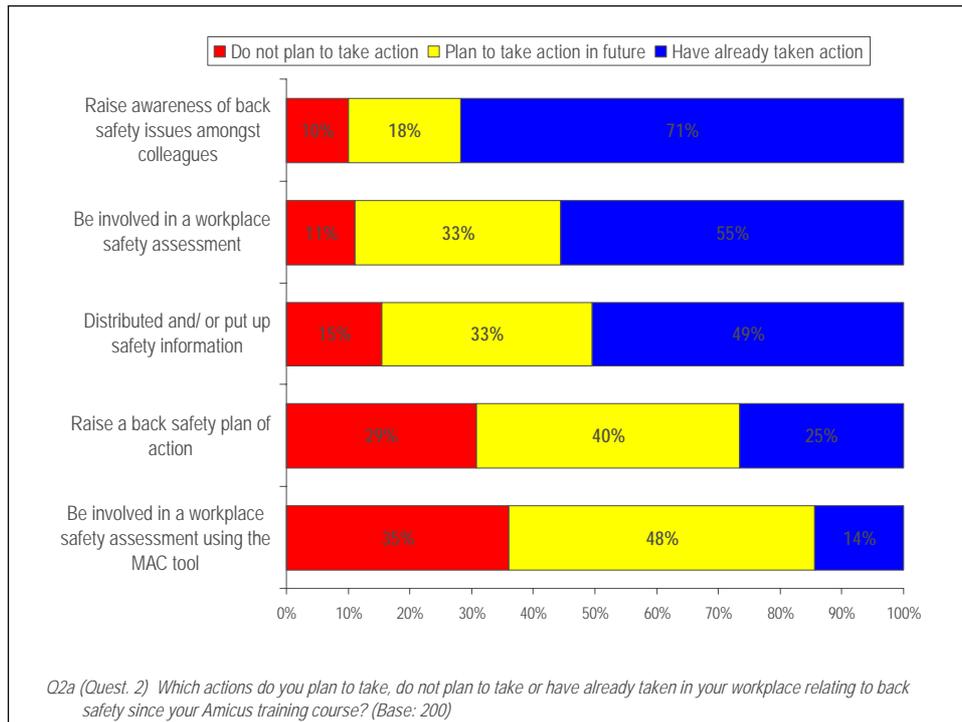


Figure 9 Actions already taken by reps in the workplace and actions planned

While it can not be assumed that all the actions taken by reps were as a direct result of their exposure to the Backs! training, when directly asked:

- 44% of reps stated that they would not have taken the actions that they did if they had not received the Backs! 2006 training on the Unite Amicus course,
- A third (33%) stated that they would have taken some of the actions even if they had not received the Backs! 2006 training
- 14% stated that they would have taken action regardless of whether or not they received the training

When asked unprompted what initiatives they intend to put forward to the safety committees/senior management immediately after attending the course (phase 1), the reps were very positive:

- 81% stating they intended to put forward using the MAC tool

When asked in phase 2 what initiatives they had actually put forward (initiatives were prompted in phase 2), the results show a gap between what the reps intended to do and what they actually did. However considerable action was still evident as around a third of the reps have:

- put forward using the MAC assessment tool to identify risks and areas of improvement (30%)
- started new or updated existing training programmes for employees (29%)
- redesigned processes or implemented new procedures around manual handling (30%)

At the same time, 27% of the reps have put forward no initiatives to their safety committee/senior management (see Figure 10).

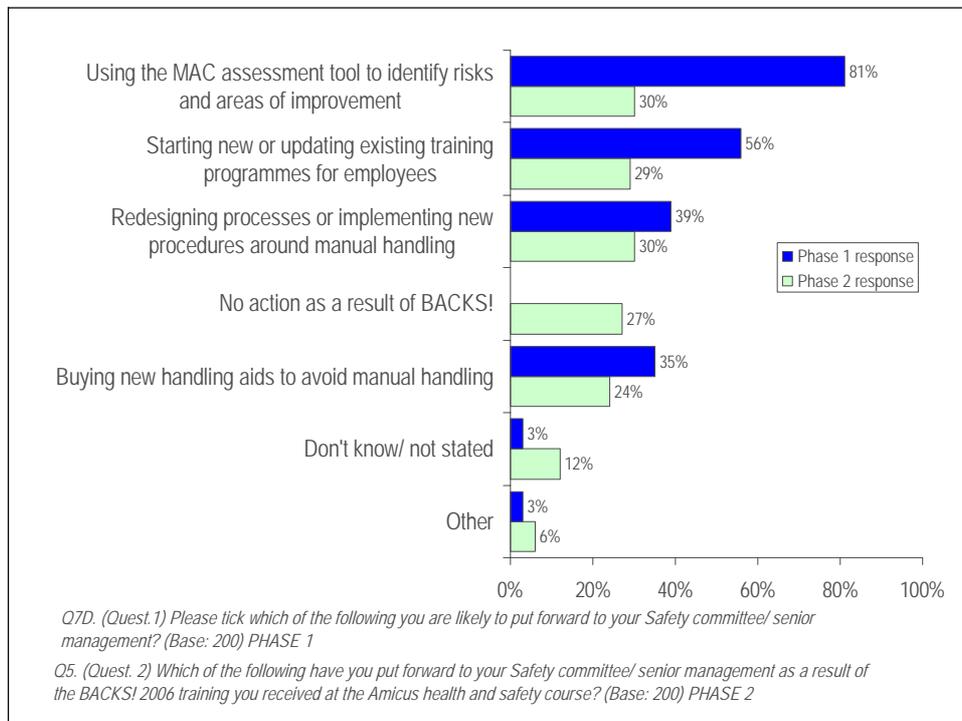


Figure 10 Initiatives put forward to safety committee/senior management – immediate intentions (phase 1) and actions actually taken (phase 2)

Figure 11 below shows that the reps who perceive the risk of back pain to be well controlled in their workplace are more likely than those who perceive the risk of back pain to be high, to have not put forward any initiatives to their safety committee/senior management. This shows that reps are discriminating the initiatives they feel are most important. If the risk is already well controlled they may not feel the need to make any recommendations.

At the same time, Figure 12 shows that reps with more experience are also more likely than the less experienced reps to have not put forward any initiatives to their safety committee/senior management. More experienced reps may have already previously made suggestions regarding back safety to their safety committees or may be using other methods to promote the Backs! information in the workplace that they have found more effective in the past.

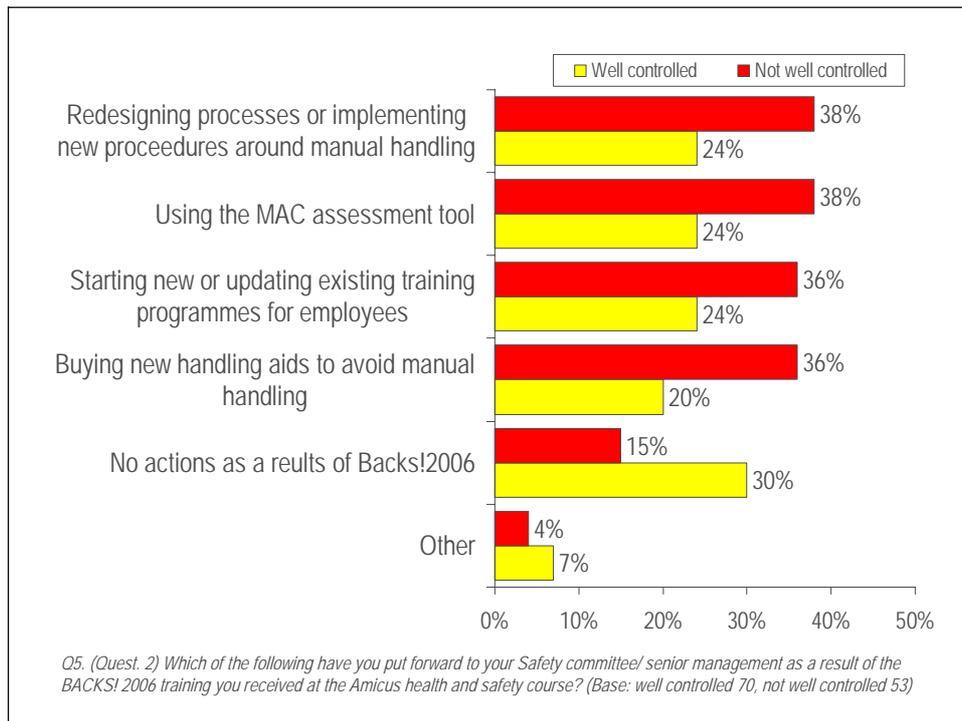


Figure 11 Initiatives put forward to safety committee/senior management – by perceived level of control of risk of back pain

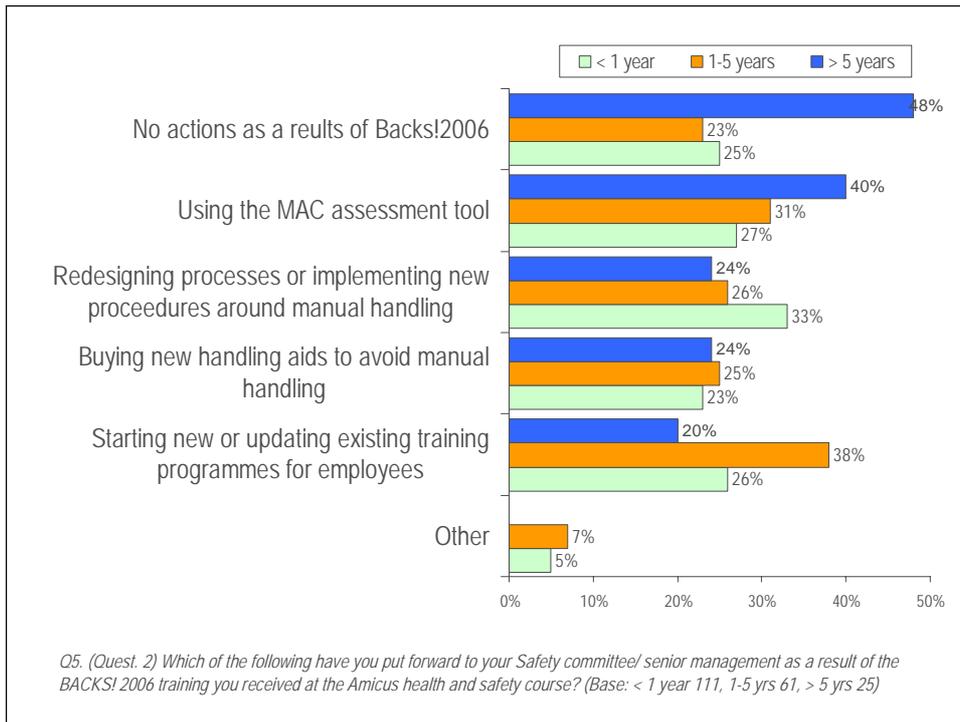


Figure 12 Initiatives put forward to safety committee/senior management – by perceived length or time as a safety rep

When asked what time frame they had made their recommendation for new initiatives in, over half the reps made recommendations within 2 months with at least 28% of those making their recommendations within a month of attending the course (see Figure 13 below). The qualitative work suggests that to some extent, the reps' ability to make recommendations quickly depended on the frequency and timing of the safety committee meetings.

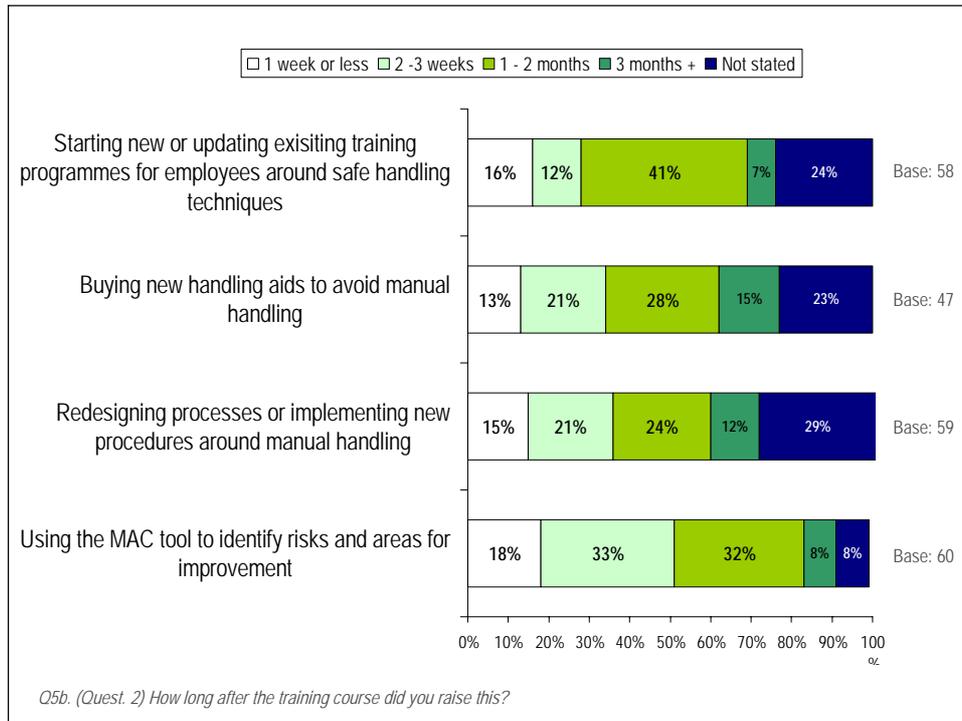


Figure 13 Time taken for reps to raise new initiatives with their safety committee/senior management

Although immediately after attending the course intentions to suggest initiatives were high among reps, this had tailed off 3 months after attending the course (see Figure 9). Therefore the phase 2 questionnaire also asked about the factors that could potentially impact on a rep's ability to put forward new initiatives within their workplace.

Figure 14 shows that financial expense and the attitude of senior management were the two factors most likely to have a negative impact on a rep's ability to put forward new initiatives, however this was still only applicable to a small percentage of reps (13% and 12% respectively). The quality of the Backs! training had a positive impact for the highest percentage of reps with 77% stating it had a positive impact on their ability to put forward new initiatives within the workplace. The endorsement by Unite Amicus of the Backs! initiative was also a positive factor for the majority of reps (70%).

Although relevance of the training to the organisation is not borne out to be a negative factor for many of the reps in phase 2, the phase 3 case studies show that relevance is important for organisations that are primarily office based.

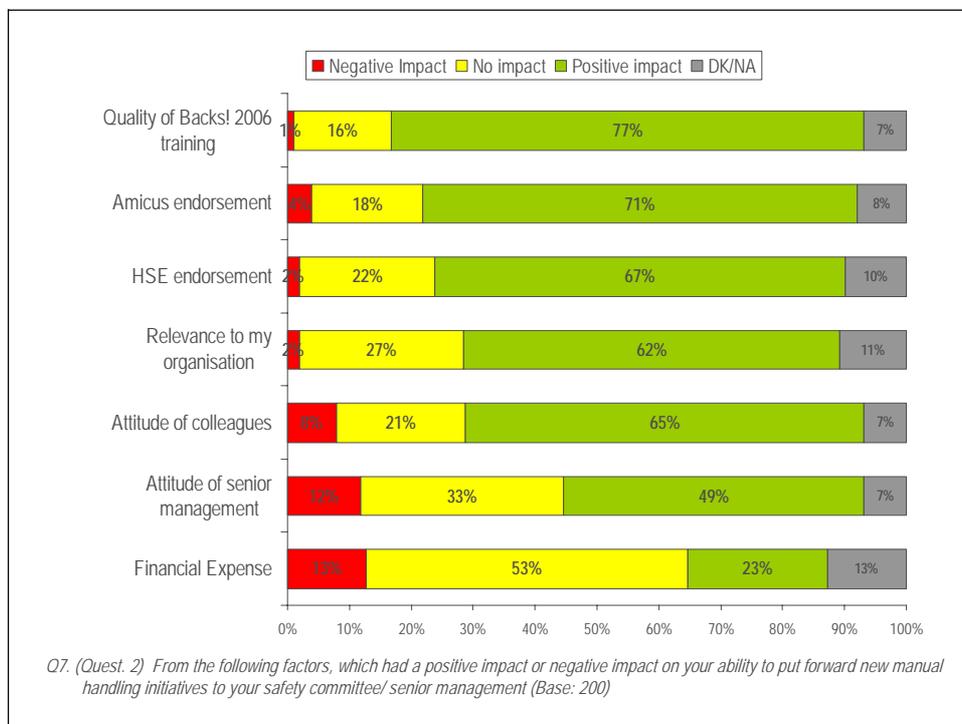


Figure 14 Impact of various factors on the reps ability to put forward new initiatives to their safety committee/senior management

3.4 INITIATIVES IMPLEMENTED

The phase 2 questionnaire also asked reps to comment on the initiatives they have actually seen implemented in their workplace as a result of the actions they have taken since receiving the Backs! training. Just over half (52%) of all safety reps who responded in phase 2 have had no initiatives implemented. However as a result of their actions over a quarter of the safety reps (27%) have seen employee training programmes and safe handling techniques initiated, almost a quarter of the safety reps (24%) have had new aids bought to avoid manual handling and 21% have seen new manual handling procedures implemented.

Figure 15 below compares the initiatives that reps put forward to senior management as a result of attending the course with the initiatives that have been implemented since the reps attended the training course. It shows that 100% of the reps that put forward buying new handling aids to avoid manual handling have seen new handling aids bought for their workplace since attending the training course.

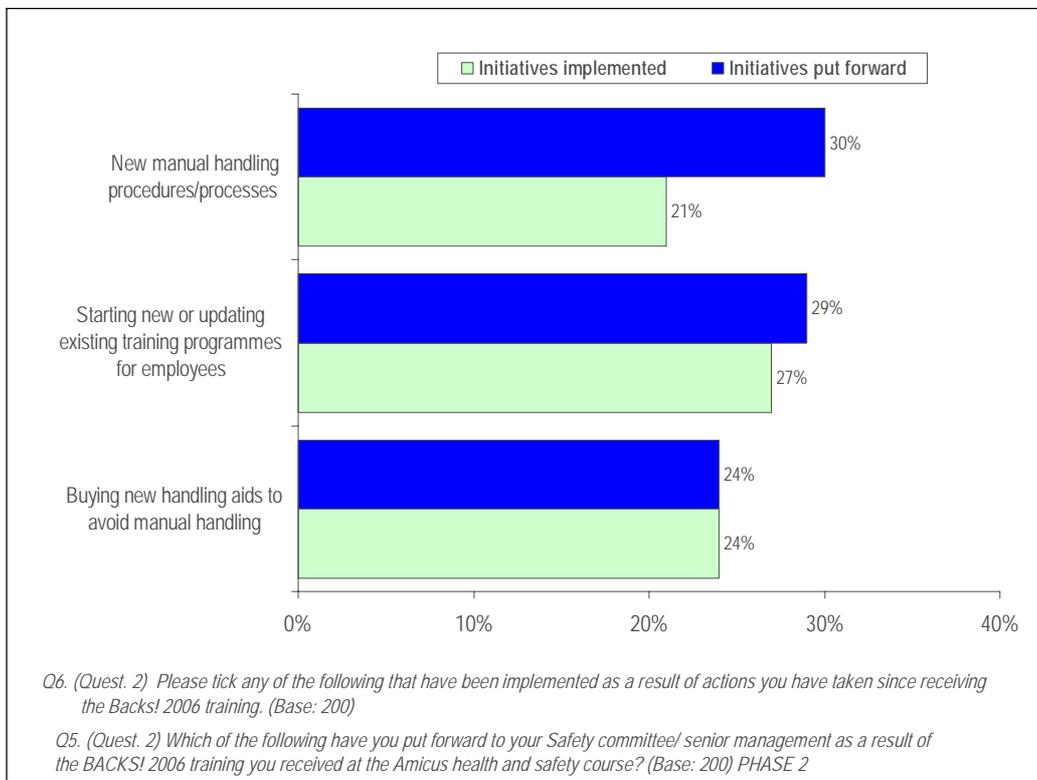


Figure 15 Initiatives put forward to safety committee/senior management compared to initiatives implemented

4. MAIN FINDINGS: SUMMARY OF PHASE 3

4.1 THE APPROACH

Phase 3 consisted of a total of nine half day site visits. The visit included an extended interview with the safety representative lasting 1.5 hours, followed by an interview with the safety representative's manager, lasting an hour and finally a discussion with a small group of employees. This approach enabled us to understand the perceived and actual impact that the Backs! training had in the workplace from different perspectives.

- The workplaces were selected to include a range of industries, environments and organisational sizes. The workplaces ranged from mines, factories and warehouses to office environments
- The case studies included Unite Amicus safety reps with a wide range of experience, ranging from 6 months to over 12 years
- The nine workplaces also covered a range of perceived risk of back pain, including high, medium and low levels
- Two workplaces where no actions had been taken since attending the course were deliberately included in the nine case studies in order to better understand some of the barriers to taking action

4.2 SUMMARY OF ACTIONS TAKEN

Seven of the nine safety reps had taken actions relating to back safety since attending the Backs! training. As previously mentioned, the other two representatives were deliberately recruited to have taken no action. The remaining seven reps all took actions with varying degrees of impact on the wider workplace:

- **High impact** - where new procedures/initiatives were implemented and both employers and employees were aware of changes relating to back safety
- **Lower impact** - where representatives felt they have raised general awareness of back issues in the workplace by for example, speaking to colleagues or putting up posters, but these initiatives have not been recognised by employers or employees

4.3 KEY VARIABLES IN DETERMINING THE EXTENT TO WHICH ACTION IS TAKEN

The case studies have highlighted a number of broad variables that appear to have an impact on whether or not a safety rep took action in their workplace after receiving the Backs! training. But the case studies also revealed that there are often a number of interrelated factors that determined what action the reps took and therefore it is difficult to generalise about what determined whether or not a safety rep took action after receiving the training. However, the following are some of the variables that had a largely consistent impact on the extent to which the reps have taken action.

4.3.1 Autonomy and proactiveness

Safety representatives have varying degrees of autonomy regarding their ability to implement initiatives:

- Some are empowered to take actions unilaterally while others are only allowed to implement safety initiatives which have been sanctioned at a company wide level
- Others have the ability to input into the development of the company-wide safety policy, however this can be a lengthy and administratively intensive process

Employers demonstrate varying expectations with regards to the pro-activeness of representatives. However, the majority of employers perceive that proactively suggesting new initiatives and raising the awareness of safety issues in the workplace to be an integral part of the representative's role.

"I think you do have some proactive [safety reps] in other locations... safety reps that want to actively be involved and be part of the process. I would say for this premises here, they're quite happy with the procedure laid down and don't change it an awful lot. They take their lead from us if you know what I mean."
Employer

"I would expect them to say this is not working. You know, the system is failing, this procedure doesn't work well. This working environment is a mess, whatever, you know." Employer

4.3.2 Relevance to workplace

The relevance of the course to representatives' industry/workplace environment has differing implications. Where the representatives' workplaces are highly relevant to the course, considerable focus may already be given to back safety resulting in little action being needed from the individual safety representative. One workplace has already implemented the Backs! training initiatives and therefore only minimum action was required from the Unite Amicus safety rep

Where the course is perceived to have little relevance, representatives are more likely to have taken no or little action, for example an office environment is perceived to have very different back safety compared to a manufacturing environment.

"Back problems aren't generally much of a problem; you don't get the lifting and carrying in the office environment that you would get in a warehousing or manufacturing environment." Safety rep

"I didn't, but as I say when I have done workplace assessments before it has just been a case of walking around and making sure things are okay rather than specifically completing a form, I don't think it's [the MAC tool] particularly relevant to the environment which I work in." Safety rep

Representatives in a workplace where back safety is relevant but perceived to be less important than other safety issues, were more likely to have taken actions to raise the profile of back safety on the safety agenda

4.3.3 Profile of the safety rep

The more senior and/or experienced safety reps in phase 3 seemed more likely to have actively suggested new initiatives to senior management and to follow-up on progress of suggestions than those reps who were either less senior or very new to the job.

- The more senior and/or experienced reps tended to be quite visible within their workplace and have an established presence
- Less experienced or less senior reps may still take actions but these may be less recognised by the employer and employees, for example they may have spoken to colleagues or just been generally more aware of back safety in the workplace

4.4 CHALLENGES TO IMPLEMENTING THE BACKS! INITIATIVE

Ability to impact company-wide safety procedures - Some representatives are unable or have little scope to have any impact on the company-wide safety procedures. This is more likely to be in larger companies which often have a number of different sites. In one company the safety policy was set by the head office and safety representatives would have to make representations to head office which would decide whether or not to implement the suggested initiative. In organisations which are very hierarchical the time taken to adopt new procedures is slow and can act as a barrier to suggesting changes.

Time constraints - Safety representatives need to balance their responsibilities as a safety representative with their full time role as an employee. Several of the representatives feel that the pressure of their full time job restricts their scope for promoting safety (including back safety) in the workplace. One of the representatives had even been gently reprimanded for spending too much time on safety issues to the expense of their full time job.

Expectations around proactivity - There were different perceptions and expectations of the degree to which safety representatives should be pro-active. In companies where representatives are not expected to be proactive in suggesting changes to safety procedures, the representative tended to adopt this approach in their role and limits their role to ensuring existing safety procedures are adhered to.

Impact on productivity - In some workplaces both the reps and some employees mention that middle management can place more emphasis on productivity than safety, this can lead to pressure being placed on workers to focus on productivity to the detriment of safety (including back safety).

Effectiveness of current safety procedures - Perceptions about current safety procedures affect the safety reps' propensity to suggest initiatives. Representatives are more likely to suggest initiatives where existing safety procedures are deemed to be inadequate and less likely to suggest initiatives where existing procedures are adequate. This is borne out in the quantitative work which showed that reps who perceive the risk of back pain in their workplace to be well controlled are more likely to have taken no actions relating to back safety since receiving the Backs! training.

“That’s what I’m saying, you can’t just change things here. As I say everything we do is very, very tightly controlled and as I say everything has had a risk assessment, a manual handling assessment and things are done for a reason.”
Employer

“I think that we’re so tied in here to fire fighting, it is a bit soul destroying really, you know you come in and you’ve got so much work to do ... but we’re just so bogged down with all the work and then that is our focus, you know just trying to keep on top of what we’re actually doing.” Safety rep

4.5 VIEWS ON THE BACKS! TRAINING

Overall the safety reps spoken to in phase 3 gave very positive feedback on both the Backs! training and the materials given out to support the training. All representatives believe the training they received on the Unite Amicus course has heightened their awareness of back safety issues in the workplace. Those with good knowledge of the issues around back safety felt it gave them a refresher on what they already knew and updated them on the current advice relating to back safety. Those with little previous knowledge of back safety issues believed the training had given them practical advice which they can take back into the workplace with confidence.

4.6 FEEDBACK ON THE BACKS! MATERIALS

Many of the representatives interviewed had attended their Unite Amicus training course over 6 months ago, however despite this, the safety reps were able to recall several aspects of the training relating to back safety. The MAC tool and accompanying video is the most frequently mentioned aspect of the course. Even where it had not been used in the workplace, for various reasons, the reps were still impressed with the tool due to its simplicity and because it takes into account contextual factors when assessing the risk of back injury. One representative is currently using the MAC tool to carry out work-based assessments.

A number of reps hoped to use the MAC tool in future and had suggested it to senior management who are considering whether or not to use this in the workplace.

Some of the reps also recalled some of the statistics around impact of back injury on workplaces which are perceived to be powerful at reinforcing the importance of ensuring back safety in the workplace.

4.7 SUGGESTED IMPROVEMENTS TO THE BACKS! MATERIALS

Although the objective of the research was not to assess the quality of the training or material received, during the course of the research some of the reps made practical suggestions to improve the training and materials which may have a positive impact on encouraging and enabling more reps to take action in the workplace once they have received the training.

- One representative wanted to have additional copies of the video available so that he could pass one onto management whilst keeping one for reference
- Some thought that courses could be tailored to specific types of workplace in order to ensure that the course was as relevant as possible e.g. manufacturing, office based etc.
- A few thought that including tips on implementing initiatives in the workplace would be advantageous, for example giving advice on how to persuade management to make safety more of a priority or encouraging the workforce to take back safety more seriously

5. CONCLUSIONS

To conclude, both the quantitative and qualitative findings provide strong evidence that promoting HSE initiatives via Unite Amicus training courses is an effective way of enabling and encouraging reps to take action in the workplace. The qualitative research findings highlight the range of variables impacting the extent to which a rep will take action and the extent to which their actions impact on the wider workplace. The HSE may wish to use these findings to target the way it communicates new initiatives to reps in different types of workplace to enable and empower individual reps to take as much action as possible within the confines of their workplace environment.

The research has also highlighted that although back safety is already an important issue that is well controlled for a number of workplaces, the training still benefits these workplaces by exposing reps to new ideas on how to manage the risks around back safety and for some it has raised the issue of back safety up the H&S agenda.

6. APPENDIX

6.1 MAIN FINDINGS: SUMMARY OF INDIVIDUAL CASE STUDIES

The following chapter gives more detail on the nine workplace case studies carried out during phase 3 of the project.

6.1.1 Case Study 1

Industry - Wholesale and retail trade; a warehouse packing environment.

Safety representative's profile – A team leader who has been the Unite Amicus safety representative since attending the Unite Amicus training course 6 months ago (having had no previous experience in this role). Three other non-union safety representatives are present in the workplace, but they do not work together as a team.

Representative's perceptions of back safety – The representative appreciates that there is a risk of back injury due to the substantial amount of repetitive manual handling that her team undertakes. However, the representative feels that the procedures and handling aides in place minimise the risk. Her role is supported, as the warehouse's senior management take back safety very seriously.

“We try to make it as comfortable as possible for everybody. I know how I would feel stood there doing that, because I actually injured my back at my previous workplace.”
Safety Rep

Views on Backs! – She feels that the training course was very helpful overall, but doesn't have a clear recollection of the Backs! element due to the large amount of information that was covered. However, the safety representative does recall statistics provided about the cost of back injury to businesses and feels that this is powerful information for employers.

“I did have an inclination before, but what I found interesting with the Unite Amicus course is that it just went that bit further and it was very hard work actually. They worked you hard.” Safety Rep

Actions taken since the course – As a result, the representative feels personally more aware of back safety risks and will show workers the best way to lift/move heavy objects and encourage them to take regular breaks. However, as her working environment is already set-up to effectively control the risk of back pain, including an effective central company policy relating to back risk, the representative has not carried out any further specific actions relating to Backs!.

“When I first came – there was a little bit of ‘oh that's not going to work’ and ‘it's going to take us longer’, but as a matter of fact it actually improved productivity.”
Safety rep

Employee viewpoint – There are mixed views amongst employees regarding the level of risk of back injury. Some have experienced back injury which they feel may be related to work, whereas others feel that there is a low risk, as the weights they are asked to lift are relatively light. Employees are unaware of the management's attitude towards back safety and feel that it is not a high priority, since they were not aware of who their Unite Amicus safety representative was until now. Although employees are

aware of some safety procedures to minimise the risk of back injury; for example, the correct way to lift weights and maximum weight restrictions, they have not seen these rules being enforced. Employees feel that the biggest challenge for a safety representative is changing behaviour within the workplace, as some admit to lifting the quickest way possible, regardless of guidance.

Employer viewpoint – The employer states that back safety is of utmost importance to senior management and that it is very well controlled within the workplace; strict processes are in place to minimise risk to employees, and quarterly risk assessments are carried out in line with corporate policy. Any changes in regulations are monitored by the company's central health and safety function who will adjust procedures accordingly to ensure that the company complies. The employer believes that the role of a safety representative is to monitor risks and to ensure that employees comply with procedures.

Additionally, they would like their representatives to be proactive and suggest appropriate changes to procedures where necessary, however he does not feel that this role is as important as the HQ Health & Safety function which will ensure new initiatives are implemented when they are put in place. As a result, the four representatives in the workplace are not currently motivated to fulfil this aspect of their role. The employer feels fortunate that there are fewer issues of concern, owing to the new design of the workplace's building which has taken all Health & Safety elements into consideration. Although he has not been made aware of the Backs! campaign, he trusts his HQ health and safety function to inform him of new HSE initiatives rather than relying on the Unite Amicus rep to do this.

“Everyone that's inducted into the business has a video about what the papers weigh and manual handling. The full induction is pretty comprehensive about what we do as a business. Backs! are part of that.” Employer

“Health and safety for the business is a direct responsibility of the house manager, so I have to ensure that we comply with everything within this organisation. It's not a safety rep's responsibility, it's everyone's responsibility...” Employer

Summary - In this organisation, the Unite Amicus safety representative is very new to her role and she currently lacks both the influence and visibility required to implement change. Although senior management is open to her being more proactive in her role, there is no expectation that she will be or needs to be. Furthermore, there is no motivation for her to promote issues or suggest changes, as health and safety is an important issue in the organisation as a whole and is regulated centrally. The safety representative's Backs! training has increased her own awareness of back safety issues and she now considers the risks when managing her own team. However, this is not visible to the employees that she manages, who were uninformed of her role as a safety representative and who remain unaware of any enforcement of procedures relating to back safety.

“I have not done a workplace safety assessment because the guys get a safety assessment every so often anyway. It covers manual handling, the whole lot. But as I said before what I tend to do it I keep a closer eye on health and safety aspects.” Safety Rep

6.1.2 Case Study 2

Industry – Financial services; an office environment.

Safety representative's profile – He has been a safety representative for over three years, during which time he has taken an active and very serious role with regards to safety in the workplace. Together with other employees within the organisation that deal with health and safety, they comprise the workplace's safety committee.

Representative's perceptions of back safety – Overall, he does not view back safety as an important issue in the workplace, and feels that generally the risk around health and safety is very low. However, the representative appreciates the danger to employees who sit at their desks for long periods, but feels that there is only limited action that can be taken against such risks.

“Generally we (the safety committee) don't talk about health and safety matters very much because there isn't the problem, it's not as if we're in a manufacturing environment or even a warehousing environment, offices are generally fairly staid shall we say.” Safety Rep

“Any back problems which are work associated would be down to posture, how you sit and with a lot of people they sit how they're comfortable so you can tell them how they should sit but whether they do that or not is another point.” Safety Rep

Views on Backs! – The Backs! element of the course did not particularly resonate with him due to the office environment of the workplace. The rep feels that Backs! is more geared towards the different environments of other industries, such as construction, where the risks are higher. In his opinion, most of the Backs! training did not seem relevant to an office environment.

Action taken since the course – The safety representative has not taken any action since the course, due to its lack of relevance to his workplace and the perceived low risk of back injury. However, he does feel that the Unite Amicus training courses are a positive initiative for the HSE to be involved in, as they allow for practical learning rather than just receiving information that might not be read.

Employee viewpoint – Employees feel that back safety is a very important issue and are aware that prolonged periods of sitting at a desk whilst using a computer may lead to back problems. However, there are mixed perceptions of how seriously the issue is taken by the safety committee; it is felt that it is difficult for the committee to make changes where a financial outlay is required. Regardless of this, the safety representative is thought to be very visible and proactive, and employees feel comfortable in approaching him with issues or problems. They are confident that he will raise issues with senior management, but understand that he only has a certain amount of influence, as Head Office ultimately make the majority of decisions.

“Oh yes, he's very active, you can't do anything without (the safety rep) telling you not to do it!” Employee

“It's difficult for people that have got (back) problems and I certainly have. I've been going to hospital but you expect the company to do something about trying to get you a decent chair... I was told (by head office) that you have to have doctor's letters and all sorts, it's ridiculous.” Employee

Employer viewpoint – The employer does not consider back safety to be an important issue and states that health and safety problems are rare. In the organisation, team managers are responsible for all work, pastoral and health and safety issues for the people they manage, and they have a good awareness of how to assess back safety issues in their teams. The employer believes that the role of a safety representative is to provide information to team managers and assist with any problems caused by health and safety issues by making recommendations to Head Office. However, the main barrier to implementing change relating to safety issues is company structure; he thinks Head Office are too slow to approve changes, particularly if it requires financial expenditure.

“We do annual work station assessments and so if anything comes up about anyone having aches and pains, anything, not just backs, but wrists, neck, we do always pick those up and deal with it in what is seen to be the appropriate way.” Employer

“I mean an individual might choose to involve (the safety rep) if they thought that something wasn’t happening or I might think ‘oh I’m not really getting much joy’, if I get (the safety rep) involved he might pick up the phone and someone (at head office) might take a bit more notice of him.” Employer

Summary - The Unite Amicus safety representative in this organisation is experienced and confident in his role and is well respected by both employees and management. Whilst back safety is not perceived to be an important issue by the safety representative or management, employees are aware of the issues and risks. The Backs! training is perceived to have very little relevance to the workplace combining this with the perceived lack of risk to back safety, the safety representative did not take any action. The safety representative was positive about the use of Unite Amicus training courses as a way of promoting HSE campaigns and he feels that practical training has more of an impact than simply receiving written information or DVDs.

6.1.3 Case Study 3

Industry – Manufacturing; an assembly plant environment.

Safety representative’s profile – A safety representative for a year, he works with three other safety representatives and senior management, who form the organisation’s safety committee. The rep is very enthusiastic and proactive in his role, regularly reviewing the HSE website for the latest campaigns and legislation.

Safety representative’s perceptions of back safety - Although there is very little manual handling in his working environment, the rep perceives that staff have a good level of awareness about the risks that exist. As a company they are proactive in their approach to dealing with such risks, through training and the use of handling aids.

“Like I say, I can not fault (the senior management) and if I go on Union courses and listen to some of (the other company’s) problems that they have got, we are light years ahead of them. You know, if a guy needs 12 pairs of gloves or more handling aids, he can have them.” Safety Rep

Views on Backs! – The safety representative has a clear recollection of the Backs! element of the training course, and is particularly positive about the MAC tool.

“(Backs!) gave me a great insight into risk assessment. The MAC chart; it’s absolutely brilliant. But up to now, touch wood, I’ve never had the opportunity to use it. Proactive health and safety is far better than reactive.” Safety Rep

Action taken since the course – He has carried out a number of actions since the training course, including recommending purchasing a new handling aid, putting up posters from the Backs! campaign, and talking informally to colleagues about posture and lifting techniques. The representative supports the use of the MAC tool, and has trained others on how to use it, although he hasn’t as yet needed to carry out a risk assessment. However, with the exception of the MAC tool, he would have carried out these actions regardless of whether he had received the Backs! training.

Employee viewpoint – Employees feel that back safety is an important issue, and state that it is something that they think about in their day-to-day roles, despite the risks being well controlled. It is felt that back safety is taken very seriously by senior management, as evidenced by the organisation investing in new handling aids and a training programme in back safety. The Unite Amicus safety representative is a well known individual within the company, and owing to his influence on senior management, he is able to initiate change. Although employees are unaware of the Backs! campaign, they do recall seeing posters in the workplace and are aware of a new handling aid that is being installed.

“(Back safety) is important, yes. Because I do quite a lot of lifting plus there’s a lot of awkward spaces you know in the assembly plant and things like this. So I appreciate it more now that I’ve done a course on it...it clicks in your mind what to do at times.” Employee

“Even if we haven’t asked for it – if (the safety rep’s) got something where it might be helpful to us he’ll probably let us know. Or if it’s something, like a training thing forthcoming... And he’ll always ask your opinion about things.” Employee

Employer viewpoint – The employer maintains that back safety is taken seriously by senior management and is a well controlled issue. He feels that the role of the safety representative is to raise issues but also to be part of the solution, to foster a strong partnership between representatives and management with regard to approaching safety. The employer has a good awareness of the Backs! campaign due to the safety representative having given him the information and MAC tool training, which he intends to use (although he has concerns about its limitations in terms of assessing individuals). The employer regards the new manual handling aid as the main change to back safety linked to the Backs! campaign, which is being purchased after the Unite Amicus safety representative conducted a risk assessment.

“We looked at case studies using the MAC tool and I just felt it came out with lower scores than I would anticipate. I think the MAC tool has its limitations. I don’t think it takes enough account of individual circumstances, health of the person, that sort of thing.” Employer

“We place more responsibility on safety reps because there is a temptation that they can be used in a very negative way, just raising problems. We try to be proactive with the safety reps, involve them in the improvement activities...” Employer

Summary - The Unite Amicus safety representative is relatively new to the role but very proactive and well respected by both employees and management within the

organisation. Although manual handling is limited in the work environment, there is a strong awareness of the risks associated with back safety and a number of initiatives in place to manage these risks.

The Backs! training has been useful for the Unite Amicus safety representative in supporting existing initiatives around back safety by providing new literature and the MAC tool, and has prompted the purchase of new handling aids as a result of a risk assessment. The organisation's management are supportive of their safety representatives and are responsive to issues raised, however they also expect the safety representative to suggest solutions. There is a positive reaction to the Backs! information that has been viewed by management, and a perception that it has brought about improvements to back safety despite it being an already well controlled environment.

6.1.4 Case Study 4

Industry – Caring; a residential home for elderly people.

Safety representative's profile – A duty manager who is responsible for a residential home for elderly residents, they have been an Unite Amicus safety representative for 2.5 years and attended the training course 6 months ago. The residential home has one safety representative for each area of the building, and thus she has been on several safety management courses prior to the Unite Amicus course.

Safety representative's perceptions of back safety – The representative believes that there is a risk of back injury due to the substantial amount of repetitive manual handling undertaken by her team. However, she feels that because senior management take back safety seriously, the procedures and handling aids that they have in place minimise such risk. The representative feels that the risk of developing back pain in the workplace is quite high, as staff assist residents who have fallen over, carry rubbish in bin bags and move heavy furniture on a regular basis.

“(The company) have got a no lift policy and obviously if you're got a tenant who is on the floor you obviously can't lift them, so your back care training is like how to turn them around...I think people are tempted to lift them, but if you do it's your back at the end of the day.” Safety Rep

Views on Backs! – She feels that the course was very good overall, as it reinforced the importance of ensuring that safe practices are implemented in the workplace. However, the representative already had a considerable amount of knowledge about back safety from previous courses. The MAC tool was perceived to be easy to use and she intends to recommend that this is used in place of the home's existing risk assessment procedure.

“I think the way that they taught the risk assessment (MAC tool) was useful, like the risks were numbered, you went along the colours to see which category it fell in to. And all the information is there if you need to refresh your memory.” Safety Rep

Actions taken since the course – The rep has presented a summary of the course’s key points to other managers at a team meeting and informed them that she has additional information on back safety if they require it. The course has refreshed her knowledge about back safety and raised her awareness of its importance in the workplace. She intends to recommend the MAC tool to the home’s committee, distribute information about back safety in the workplace and develop a better procedure for storing cleaning materials.

Employee viewpoint – The majority of staff view the risk of back injury as being quite high in the workplace, as they lift heavy boxes and rubbish bins, and move residents (despite the lack of an official lifting policy). Employees believe that the management is serious about workplace safety as they are aware of Head Office’s policies. All centre managers are given a safety training induction when they join, and this is then reinforced by the Unite Amicus representative who explains in practical terms the implications of the policies.

The safety representative is respected and known to the managers of the home’s other areas; some of whom have asked for advice on health and safety issues. She updates the other managers on changes to safety procedures at the monthly team meetings. Employees feel that there are two main challenges for safety representatives: the first being that Head Office’s health and safety policies limit a representative’s ability to implement changes at a local level; their approval for new practices needs to be obtained beforehand. Secondly, limited budgets restrict the home’s purchase of safety equipment. If staff were able to use a ‘Manual ELC’ they would no longer need to physically lift residents themselves. However, this equipment costs £1k per unit, and one unit would be required in each of the 180 centres that the organisation is responsible for.

“Back safety is really important. Every aspect of the job involves your back really, it might be something as simple as having to move a table across a room, setting up a room for a function, you might have an emergency where you’ve got someone on the floor or stuck in a bed; its all involving backs.” Employee

“It’s actually nice to have someone (the safety rep) who understands our role as well who you can actually relate to and say you know ‘How would you do it?’ And she’s had to do it; it’s different when someone else who sits in an office is telling you what to do.” Employee

Employer viewpoint – For the employer and senior management, back safety is of utmost importance and is very well controlled. The employer cites that strict processes are in place to minimise risk of back injury, such as a no lift policy and work based risk assessments. Trolleys have recently been introduced to reduce the need for lifting bin bags of more than 5kg. All incidents are reported to the central health and safety function who will recommend actions to reduce the risk of a similar incident occurring. Additionally, the central health and safety function monitors any changes in regulations, and then adjust procedures to ensure the company complies.

The employer feels that it is the role of the safety representative to ensure that existing back safety policies are implemented. They should also act as a peer referral point for other scheme managers to informally ask for advice, without having to approach senior management of the health and safety team at Head Office. Representatives are additionally required to ensure new scheme managers are aware of the practical ways of implementing the Head Office health and safety procedures. The employer is aware that

there are materials available from the Backs! campaign that the representative attended, but they have not read them as yet.

*“(The safety rep has) a sort of a watching brief as a helping hand because people like to have somebody local to turn to rather than ringing (Head Office) and it is actually of benefit for me to know that they will contact (the safety rep) and she’ll tell me.”
Employer*

*“I wouldn’t want (the safety rep) to have a huge amount of power but I would want them to have the status of being listened to and their information carrying weight.”
Employer*

Summary - The Unite Amicus safety rep is established in her role at the residential home, and is knowledgeable about health and safety issues including back safety, is respected and utilized by some of her colleagues. However, she is prevented from being more pro-active by a lack of time to implement initiatives and is limited in her ability to enforce changes in working practices due to the need to liaise with Head Office. Health and safety issues are taken very seriously by the company which undertakes risk assessments, work based and off site training and refers to a comprehensive health and safety manual. The safety representative feels that the Backs! training has refreshed her knowledge of back safety and has further raised the importance of this issue in the workplace.

6.1.5 Case Study 5

Industry – Logistics; a delivery firm, transporting goods in pallets to companies.

Safety representative’s profile – The safety rep has been in the role for one year, identifying safety issues and reporting them to the organisation’s management. Although the logistics manager has an overall responsibility for safety in the workplace, the safety representative is very active in his role and takes it seriously.

Safety representative’s perceptions of back safety – He views back safety as being important, and cites a number of safety initiatives which have reduced the risks of back injury to a minimal level. The main risks associated with back injury are wrapping pallets and a small amount of light manual handling. Health and safety is taken seriously by some managers on some sites, although the representative notes that on other sites there has been a reluctance to implement safety improvements.

“It’s just a case of drumming it into the drivers and also the staff on the site that this is the way that we must operate and there can’t be any variation from that. I think there has been a bit of history, a bit of politics about receiving instructions. But all in all we have made a big step to make it a lot safer.” Safety Rep

Views on Backs! – The safety representative feels that the Backs! course provides excellent guidance. The MAC tool is easy to use and takes into account the context in which activities take place, making it a more realistic way of assessing risks. He feels that the course was delivered well by the trainers and was equally accessible to a wide range of people.

“We left the course thinking ‘oh, this is a blooming good idea this is, we are going to have to talk it through with our colleagues and managers’” and that’s exactly what I did. I had a safety meeting shortly after I came back...and (my employer) took the spare pack that I managed to get and rolled it out.” Safety Rep

Actions taken since the course – Since the course, the representative has promoted the MAC tool to the logistics manager and has encouraged its use to re-evaluate many of the existing activities which have previously been risk assessed using other methods. He has also raised the profile of back safety with the logistics manager who has implemented an internal training programme within the organisation.

Employee viewpoint – Employees feel that they are at a medium risk of back injury, and cite tasks such as lifting small boxes, wrapping pallets and offloading pallets as hazardous. They believe that the management is serious about workplace safety and are aware of some of the safety initiatives which have been implemented, including the use of pallet trucks to limit the amount of manual handling. However, although staff are aware of the safety representative, they have little contact with him as he is also a driver, and often works different shift patterns from them.

Employees feel that the Backs! course has raised the awareness of back safety in the workplace and have also been shown further educational DVDs on the subject. They are also now aware of the MAC tool which they consider to be a very flexible tool for evaluating workplace risks that also includes contextual factors.

Employer viewpoint – the logistics manager takes back and other work safety very seriously and is pro-active in identifying ways of improving the working practices and environment rather than ‘waiting for accidents to happen’. Team managers are responsible for all work, pastoral and H&S issues for those under them and there is a good awareness among team managers of how to assess back safety issues.

The role of safety rep is to be a conduit between employees and management. The role is very useful since it helps safety issues become implemented in the workplace since they are more likely to be perceived as safety initiatives than management initiatives if they are advocated by the safety rep. Also has a role in dealing with safety queries from other employees. There are no barriers to implementing safety issues in the workplace except employee willingness to adopt changing working practices

“I certainly found (the safety rep’s) support useful when we introduced a different type of work wear which was basically hi-vis clothing. At that point there were a number of individuals who just didn’t want to wear it because they didn’t fancy it, so he made it quite clear that it was their responsibility.” Employer

“I seem to recall there was a fair bit of promotion around (Backs!) at the time after (the safety rep) had been away and done his course; we did some further training on it and assessment so it was all well publicised. The profile was raised.” Employer

Summary - The Unite Amicus safety representative is confident in his role and feels that the Backs! campaign information strengthens his authority in back safety. Following this, the Backs! training has enabled him to raise the issue of back safety in the workplace through the implementation of work based assessments. The Backs! training was very well received, especially the MAC tool which has been used in evaluating the risks associated with several work based activities since attending the course.

6.1.6 Case Study 6

Industry – Manufacturing; a factory environment.

Safety representative's profile – He has been a safety representative for three years and a senior safety representative for two years. Together with other safety representatives in his organisation, he is part of their health and safety committee. The safety representative believes that staff take him more seriously because he is an Unite Amicus representative.

“If I just went to the office, even as a union member, not as a rep and said this needs to go in, I don't think they would take it as seriously as the fact that I am the union rep...it just gives it that bit more clout you know.” Safety Rep

Safety representative's perceptions of back safety – He feels that back safety is very important in the company due to the varying degrees of risk in their work environment, and is taken seriously by staff of all levels. Those who are working in manual handling are at highest risk, as a lot of lifting is done manually (without use of the lifting aids available). Consequently, in the last year the company have employed an external training company to train all on manual handling. Due to senior management not being 'on the floor', they often rely on others (especially himself) to bring safety issues to their attention.

Views on Backs! – The safety representative thinks that the course was excellent, and although back safety wasn't really a priority for him previously, the course has made him realise how important it is. However, despite feeling that the information and resources were good, a lot of the information presented was related to warehouses and he would have found it more useful if it was more relevant to his workplace. He also would have liked more information on using aided machines.

“The assessment tool (MAC) as well you know, I thought that was all a good thing to have...it's just that I haven't really had the opportunity to use it because of what's in place already and the type of areas that they cover.” Safety Rep

Action taken since the course - The course has given him the knowledge and authority to make changes, which has also given him confidence in his actions (whereas before the course he was unsure). As safety representative, he has implemented the MAC tool and uses it regularly. He has raised awareness among the rest of the company and increased the importance of back safety on the agenda of management who are now taking more responsibility regarding back safety e.g. providing external training on back safety.

Employee viewpoint – Employees feel that there are mixed levels of back risk in this work environment. Those who work in the office perceive relatively low back safety risk, whereas those who work on the factory floor have a very high back safety risk. Some staff have experienced back injury which they feel may be related to work. However, there is some concern that employees can use back pain as an excuse to avoid work. They believe that the management take back safety extremely seriously, and that this may have been instigated by employee claims about back pain. Conversely, though training courses have made them aware of procedures, they are without evidence that they are being enforced by anyone.

Employees view back safety as the individuals' responsibility, but believe that they should be reminded of procedures by management and safety representatives. Until

now, they were unaware that the organisation had an Unite Amicus safety representative and feel that the person needs to make himself known more by spending time with workers on the factory floor.

Employer viewpoint – The employer views back safety as important to senior management and believe that the risk is being controlled well. He notes that if there is something that can be done to improve safety, the senior management are willing and more than happy to do it. Risk assessments are carried out every month by management and senior line staff in each section of the factory, and a health and safety committee meet every month.

The employer feels that there are good feedback processes for employees in place e.g. suggestions from anyone can be put forward to the health and safety committee for them to discuss. In his opinion, the role of a safety representative is to monitor risks, ensure that employees comply with procedures and react to incidents and accidents. However, he also expects them to be proactive and prevent accidents from happening. The employer has no awareness of the Backs! campaign, the MAC tool, or of any new procedures being introduced as a result of the training course.

“It’s becoming increasingly more and more important to have people like (the safety rep) out there on the floor because they’re now acting in the role that we can’t get out and do. I mean he is still very much tied because he’s got to do his own job so he’s not in a position where he can do as much as we can...but anyone on this site is entitled to stop a process if someone sees something that isn’t safe.” Employer

“(Campaigns like Backs!) tend to give drive action so it is always good to get people trained, it is always good to refresh people’s knowledge and keep them up to date with the latest regs...” Employer

Summary – Although the Unite Amicus safety representative has been in his role for many years, some employees and senior management are still unclear about whom their Unite Amicus safety representative is. However, the company and senior management take back safety extremely seriously and have a number of processes already in place to minimise risk (e.g. rotating manual handlers). They have had a back safety training course which was compulsory for the whole company to attend (including admin workers) and this has made employees more aware of the risks and has put more onus on the individual to prevent back injury.

The Backs! training has been useful for the Unite Amicus safety representative as it has given him further knowledge and information, and he now frequently uses the MAC tool. He feels the training on Backs! has increased his own awareness of back safety issues and has increased his confidence and authority to implement change within the organisation.

6.1.7 Case Study 7

Industry – Manufacturing environment, making white goods

Safety representative’s profile – He has been an Unite Amicus rep for 1 year and works on the shop floor manufacturing ovens.

Safety representative’s perceptions of back safety – He does not see back safety as an important issue in the workplace. There is very little manual handling and there have

been several procedures which have been introduced to reduce manual handling such as smaller boxes for components and component boxes with the maximum numbers of components to be carried safely printed on the outside of the boxes. There are also several other procedures in place to reduce the risks of back injury such as lifting aids and training on back safety in the workplace. There is a nurse on site and a machine which had caused injury to an employee has been motorised to avoid the need to push and pull it into place.

“It’s a global situation, to deal with everybody’s incidents, whether it be somebody cuts her finger, or whether somebody has done something serious. So I cover everything basically from very minor to the major.” Safety Rep

“If I recommend something which I believe is an issue to the members, whether it be a union member or a non union member, then the company do pay attention. So I believe that I have as much power as anybody has within this company in terms of health and safety.” Safety Rep

Views on Backs! – The rep found the course very useful. He thinks that the Mac tool is an excellent tool for conducting risk assessments and it is easy to use. The visual materials such as the DVD were also very informative at showing you how to conduct a work-based assessment.

Actions taken since the course – He has conducted a plan of action which recommended the motorising of a piece of machinery which previously had to be moved manually into place. He talks informally with colleagues about back safety and has put up posters on back safety in the workplace. As yet he has not needed to do a workplace assessment but feels confident that he now has the appropriate tools and the knowledge to do this.

Employee viewpoint – Employees also think that the risk of back pain/injury is low, rating at 1 or 2 out of 5. They are aware of the lifting aids provided, although some employees do not use these because of time pressures to get the work done. They are also aware of the smaller boxes for components and the motorised machine which previously had to be moved into position by hand. They are also aware of a ‘train a trainer’ course which is run by employees for employees about back safety.

Those who work near the safety rep know him and think that he is very pro-active about safety issues including back safety. Those who do not work near the rep are less aware of his safety activities. Employees think the rep is very effective at raising health and safety issues with management and have seen posters which he has put up about back safety. Employees think that the safety rep should be given more time to pursue safety initiatives within his working day.

“I think (concern about back safety) comes from all levels because I mean we have a system here as well where we can put ideas in and if you see anything that you don’t think is quite right or you think ‘oh, I can improve on that’ they will put ideas in.” Employee

“If I see something that’s possible that could happen that I couldn’t do myself, then I would go to him (the safety rep). If it’s a problem with maintenance or anything like that, then you’ll get the maintenance department then they’ll have to sort stuff on the line.” Employee

Employer viewpoint –The employee considers back safety to be important but does not consider there to be a significant risk because of low levels of manual handling. There are a number of policies in place to reduce back injury. Risk assessments are conducted on workstations and there are lifting aids available. The ‘train a trainer’ course is run in house on back safety and there is a nurse on site.

The safety rep is pro-active in raising safety issues with management and he is also instrumental in suggesting solutions to safety issues for example, suggesting that a manual machine should be automated to avoid manual pulling and pushing. The management is aware of the Mac tool, however do not think it is as thorough as other risk assessment procedures because it does not take into account individual circumstances. The employers value the Unite Amicus status of the rep since they believe that workers are more likely to trust the opinions of a fellow union rep than the management.

“Yes, (the safety rep) is proactive about health and safety issues. You know, he realises that you’ve got to work as well and everybody works together to achieve that aim.”
Employer

“I suppose a barrier (for the safety rep) could come in if it were to detract from production to a great extent, but I think if management were made to see that there was a serious issue then they would do whatever it took to put things right.” Employer

6.1.8 Case Study 8

Industry – Manufacturing; chemical plant

Safety representative’s profile – He has been an Unite Amicus safety representative for 12 years. There are 2 other Unite Amicus safety reps on the site as it is a large site of over 650 workers. There is a large health and safety committee and a health and safety function based on the site as well as a contract with an occupational health centre on site with 2 full-time nurses and a part-time doctor.

Safety representative’s perceptions of back safety – He feels back safety is a very important issue in the workplace and that the company is incredibly safety conscious as the overall risk of health and safety issues is very high due to the use of hazardous chemical in the manufacturing process.

“Safety is part and parcel of my responsibility, not only as a safety rep but as an employee here, it always has been. You’ve always got safety forms you’ve got to fill in; we’ve got our own safety audit system. To (the company), safety’s paramount, if you don’t think about safety then you haven’t got a job.” Safety Rep

Views on Backs! – He found the course really useful in refreshing his knowledge around manual handling and reaffirming that the procedures they already have in place are correct. The materials have been particularly useful. He has shown the leaflets and assessment charts to other safety reps and shared it with the occupational health nurses that are on site. The DVD also stuck in his mind as being something memorable but he didn’t receive a copy from the course and would have like to.

Action taken since the course - The rep has shared the information given to him with other safety reps and the occupational health centre but back safety was already high up on the overall health and safety agenda in his workplace before he attended the Unite

Amicus training course. The central health and safety function had already launched a programme of training for all employees to cover manual handling using material from the HSE and a back safety charity. As a result the rep felt there was very little he could actually do to raise awareness among the workplace as this was already being done so he spoke to the other safety reps and showed them the HSE material he received on the course.

“I’ve suggested an automatic baling system at meetings I’ve been to. When we were smaller, manufacturing acetate products, production came first, safety came second. But now we’re under a bigger umbrella company again; this company’s got mega money, so safety comes first with them, not production.” Safety Rep

Employee viewpoint – There are mixed views on the level of risk of back injury depending on the job function. Those working in the office environment of the IT or accounts department do not see there being a huge risk to themselves but appreciate the workers on the shop floor are at more risk. They are very aware of back safety issues due to the training they recently received on back safety and feel that management take all issues relating to health and safety very seriously. They have no specific awareness of the Backs! campaign but recall seeing new posters around the workplace that have coincided with the training programme. Overall they felt the training had had a real impact on the way people think and act about back safety both in the workplace and in their personal lives.

“I think people are more likely now to seek assistance and help to try and lift a heavy or awkward object than they would have been in the past and I think that’s down to an increased awareness.” Employee

“(The safety rep) has had a few (posters) up in the lab for a few months but there are a few more over the last few weeks. The driving one I seem to see a lot. The skeleton driving.” Employee

Employer viewpoint – The employer covered in this case study was the head of health and safety for the company across the two UK sites. His remit involved setting the agenda for the training over the course of the year and ensuring all safety procedures and regulations are adhered to. He regularly uses the HSE website to check for new information and campaigns and that’s where he first saw the Backs! campaign and decided to run a training course on manual handling through the course of the year to cover all employees.

He feels back safety is a big issue for the organisation and something he needs to prioritise. He sees the role of the Unite Amicus rep to bring to his attention any particular issues in their area and to make suggestions around how to solve these issues. The Unite Amicus reps came to him with the material he received on the Unite Amicus course and he looked over it in conjunction with other material he had gathered on back safety from other sources. He thinks it’s important that the HSE works with Unite Amicus to promote specific campaigns as he would expect the Unite Amicus rep to bring to his attention any new initiatives he may have missed.

“I was aware of the Backs! campaign and I’ve got the CD and signed up for all the e-mail updates and used the website. We downloaded some of the PowerPoint material to use as the basis of back issues training.” Employer

“(The safety rep) fairly regularly sends me stuff that he has had from his contacts with the Unite Amicus reps in other businesses, so on a quite regular basis he’d send me stuff that was worth having a look at.” Employer

Summary – The Unite Amicus rep is highly experienced and is very committed and is very proactive in his role however the existence of the central health and safety function means his remit is generally restricted to his immediate working environment. He does have the opportunity to influence actions taken and will do this when he feels it is necessary.

The considerable focus and activity around back safety that was already taking place in the workplace prior to him attending the course meant that there was little requirement for him to get involved with further promotion of back safety. However, he still shared the information he had received on the course with a wider audience to check that all the techniques and advice included in the Unite Amicus course were also being covered in the training that was being given.

6.1.9 Case Study 9

Industry – Mining, mine site environment

Safety representative’s profile – He has been an Unite Amicus safety representative for 3 years. There are 2 other Unite Amicus safety reps in the mine, each covering different areas e.g. electrical and mechanical but he tends to coordinate the activities of the 3 of them and is the more experienced rep. Sees his role as being a communications link between the workers and the management with regards to safety concerns. He filters out the requests which are inappropriate or unnecessary and passes on genuine concerns. He also raises issues he may have or suggestions for improvements to the mine manager who sits on the safety committee – however he said that the relationship between the mine manager and himself was not as productive as he would like it to be.

Safety representative’s perceptions of back safety – Back safety is an important issue in the mine but not as important as other potentially fatal risks. The general attitude to safety is very positive as the workers are very aware of the consequences of accidents happening in the mine and it’s very high up on the management agenda. There are manual handling aids in the workplace to avoid lifting and manual handling is covered in regular training courses so all employees are trained on how to lift properly.

“We’ve got a culture, if we see anybody doing anything wrong, we pull them up, it doesn’t matter who it is. Everyone’s looking out for everyone else. It’s more of a family in a mine, more so than at a factory. We’ve got a very good safety record here.” Safety Rep

Views on Backs! – He found the course useful in giving him some new ideas on how to train people on back safety. He thought the DVD was particularly useful and had passed it on to the management to review with a view to incorporating it into the existing training courses. He felt the DVD gave a new perspective on lifting techniques and would stick in people’s minds after they had received the training. He also thought the MAC tool was potentially very useful and again had passed this on to the mine management to review with the recommendation that it be used for risk assessments in future. He felt it was particularly positive that the HSE and Unite Amicus were working together and he thinks that this should happen more often.

Action taken since the course - The rep has shared the information given to him with the mine manager and suggested using the DVD and the MAC tool in future. He's asked the HSE to send him more information so he can put up posters and leaflets within the workplace as he does not have access to the internet or email which makes it difficult to keep up to date on the HSE materials and initiatives. He relies on the mine manager to pass on information to him from the HSE but thinks this may be filtered if there are changes that may have cost implications as he feels that management sometimes put production before new safety initiatives if they are going to cost money.

"I thought the video was good and I did suggest that (the management) played it to people. I haven't seen it played here yet though. Yes, I thought the video training was actually more beneficial than the paperwork really." Safety Rep

Employee viewpoint – Employees see there is some risk of back injury but it is less of a concern to them than other safety risks in their working environment. One employee suffered from back problems and therefore paid more attention to back safety procedure than the other employees. They think the risks around back safety are pretty well controlled at the moment and appreciate that there are manual handling aids available and maximum weights that they are allowed to lift to avoid injury. They have also received training on manual handling every 3 years and most of the workers have been there for over 10 years. They all try to adhere to safety procedures around back safety but admit they need someone to enforce it. They do recall seeing some posters up in the workplace around back safety but they've been there for a long time and they don't recall anything recently.

"You know, we work in a very dangerous environment, so it's treated with more respect (than other working environments); you're not to be pushed into doing things beyond your capabilities." Employee

"(The safety rep's) just a work mate and if you need assistance, you really don't have to make an appointment to see him. But he's only been with the company for two years, so it's probably one of the reasons why I probably wouldn't go to him. I'd go to the managers." Employee

Employer viewpoint – The mine manager is very involved with health and safety and regularly reviews the HSE site himself. The corporate policy for health and safety is reviewed annually and they are audited by an independent company to ensure they adhere to all regulations. They've been very proactive at eliminating the highest risks of back injury and invested a lot of time and money in doing this. They've reduced the weight of the containers by half and have manual handling stations wherever manual handling tasks are carried out on a regular basis so that people have pieces of equipment that eliminate or mitigate the stresses on their backs. They ensure 2 people lift weights if it's above 25 kilograms and where there are repeated actions they've brought in pallet trucks that have scissor lift mechanisms on them.

He sees the role of the Unite Amicus rep to primarily facilitate the communication up and down of health and safety information or procedures to ensure that communication is effective. He also thinks the reps role should be to monitor and validate (on a quarterly basis) that the systems that are in place are effective and working smoothly.

He has reviewed the information given to him by the Unite Amicus safety rep and used it to compare their existing procedure but feels there was nothing new that he needed to

make any changes to. He is still to review the DVD but intends to do this. He also uses the HSE web site on a regular basis so was already very aware of the Backs! campaign before the Unite Amicus rep gave him the information.

“I mean for me the biggest issue that I can see (for safety reps) as usual are personal ones, you know...clashes of personality and overcoming those in a sort of amicable way to communicate with everyone.” Employer

“(After the Unite Amicus training) I think one of the comments (the safety rep) made was that there must be some places that, you know, aren’t great because very much of what was asked in there we’ve already done or we’re on with.” Employer

Summary – The Unite Amicus rep is proactive and takes his role very seriously but there were some indications that he found the relationship with the management a challenge in fulfilling his role. He felt some frustration that he did not receive any feedback on the materials he had given to the manager. The management expects the Unite Amicus rep to give him any information he received on training courses, however, he was already aware of the Backs! campaign and felt strongly that their current safety procedures adequately controlled/minimised the risks of back injury in the workplace.

6.2 SAMPLE DEMOGRAPHICS: COMPARING PHASE 1 & 2

676 phase 1 questionnaires and 200 phase 2 questionnaires were collected and analysed. The following charts highlight the demographic breakdown of both samples and shows that phase 2 is broadly representative of phase 1 in terms of demographics. The phase 1 sample is not necessarily representative of the overall demographics of the Unite Amicus total membership however this study was not intended to generate an estimate of the potential impact of training on the wider Unite Amicus rep population. The study was designed to evaluate what *can* happen when a particular group of safety reps receive training on an HSE initiative.

Just over half the safety reps who responded in phase 2 work in the manufacturing sector (52%) which falls just below the total average of all phase 1 safety reps (60%)

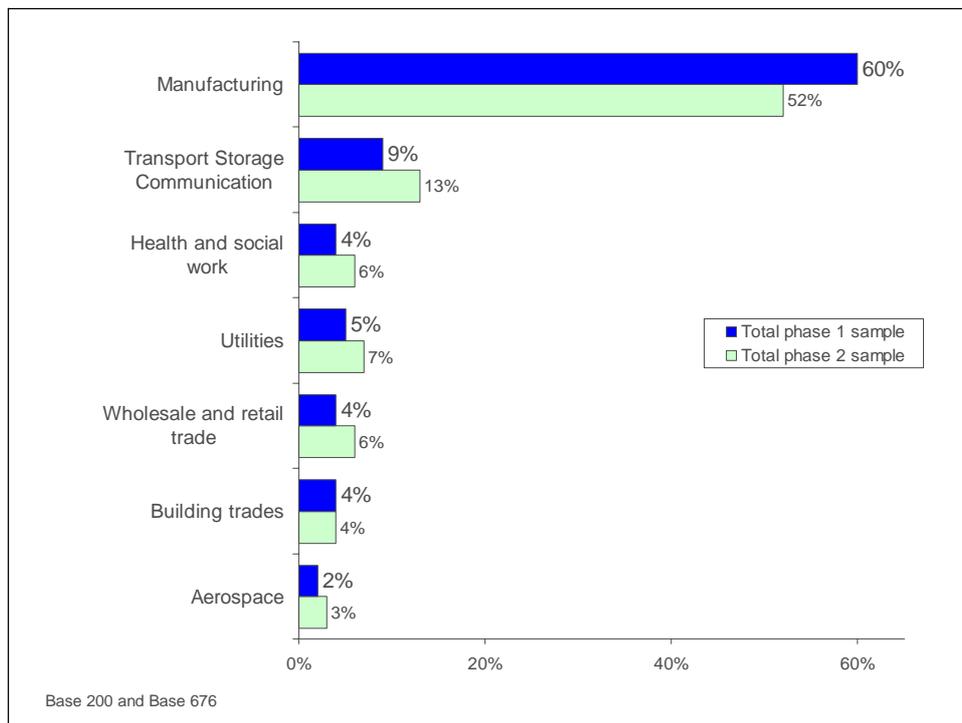


Figure 16 Phase 1 and phase 2 samples by industry sector

Most phase 2 reps work within skilled trades (41%) or as process/ plant/ machine operatives (22%) which closely corresponds with the total phase 1 sample.

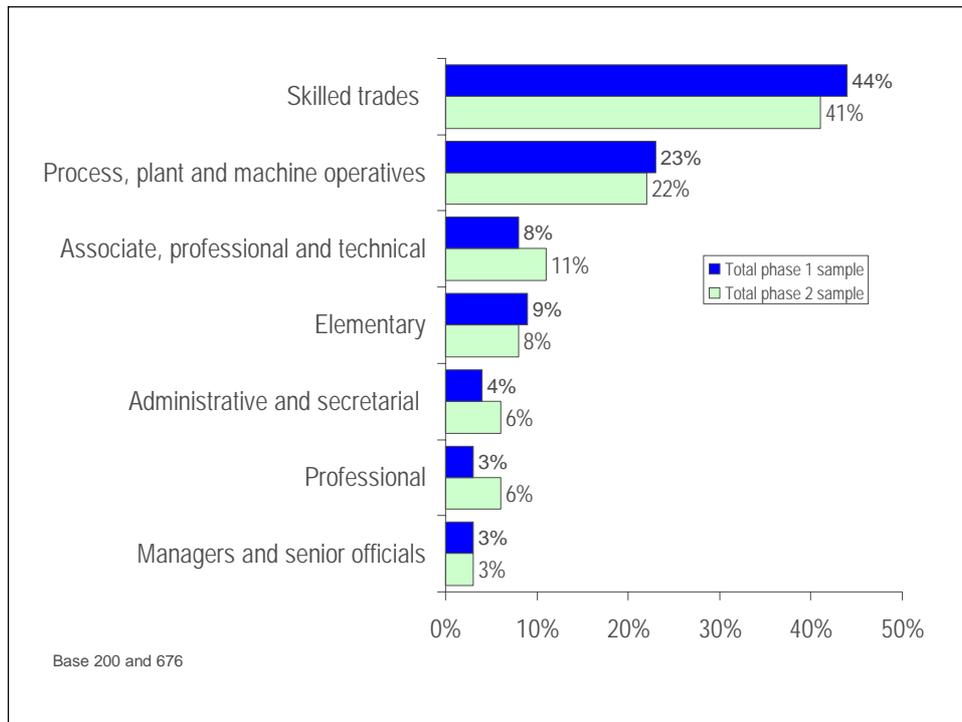


Figure 17 Phase 1 and phase 2 samples by occupation

The phase 2 sample has a slightly higher percentage of reps working in the 250-1000 employee workplaces than phase 1 and a slightly lower percentage of reps from the larger workplaces.

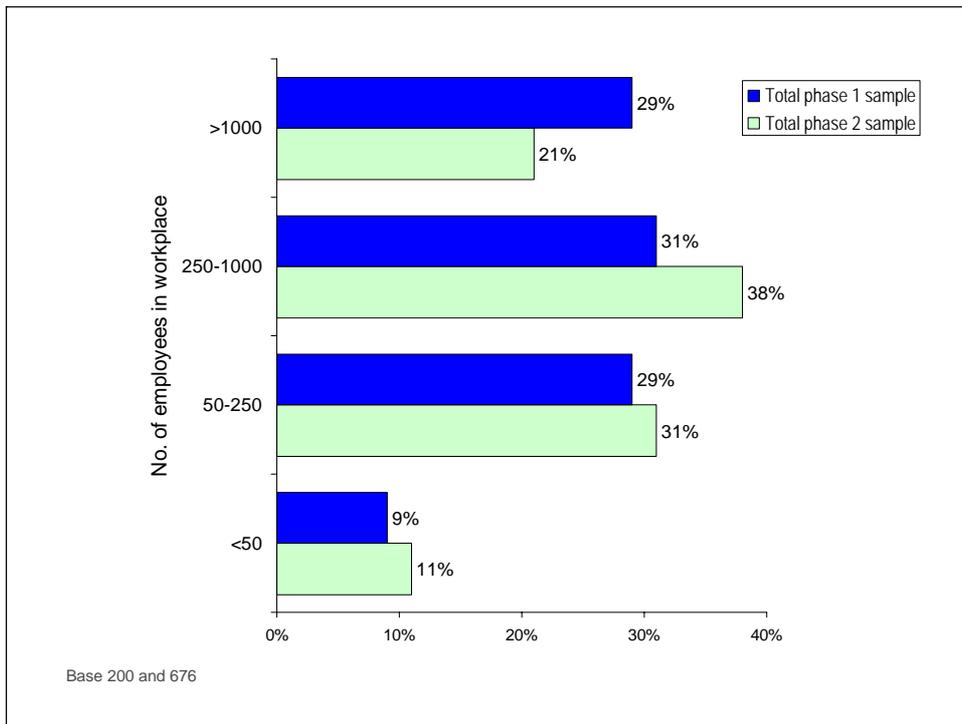


Figure 18 Phase 1 and phase 2 samples by size of workplace

The regional spread of reps is not representative of the overall profile of Unite Amicus membership but reflects the spread of reps who attended courses between January and September 2006.

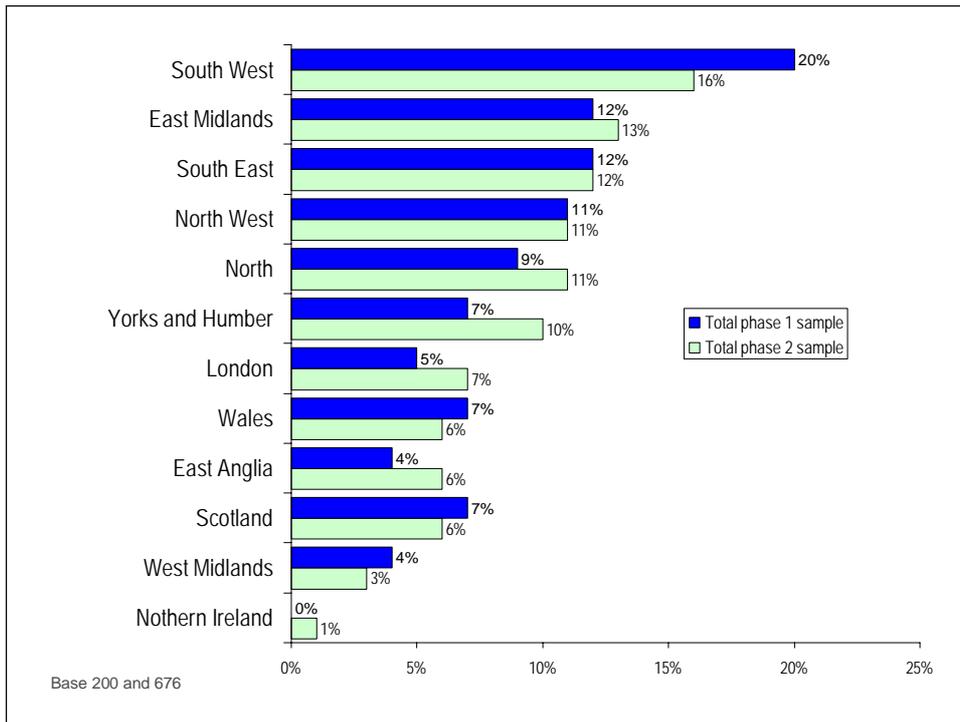


Figure 19 Phase 1 and phase 2 samples by region

In phase 2, 71% of reps have had no previous involvement with H&S prior to current role and half of the reps have been a H&S rep for less than a year. This closely tallies with the phase 1 sample where 70% have had no previous involvement with H&S.

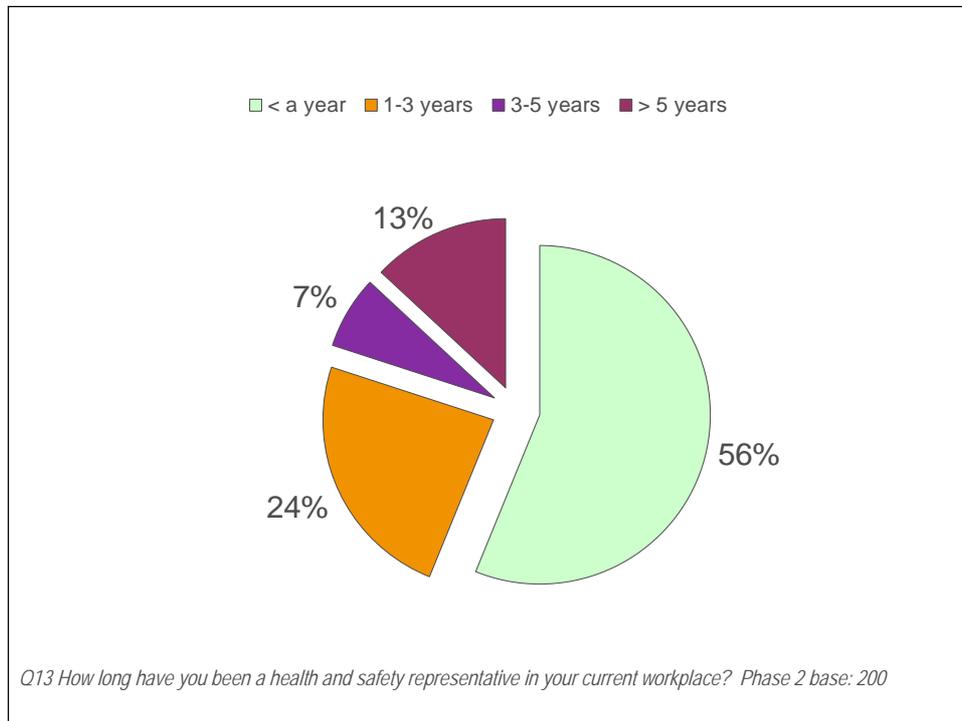


Figure 20 Phase 2 sample by length of time as a safety representative

6.3 PHASE 1 QUESTIONNAIRE

Name (please write in your full name)

Health and safety in your workplace

- Q1 (A) On a scale of 1-5 please rate the current level of overall health and safety risk in your workplace.
(1 = very low risk, 5 = very high risk)

	1	2	3	4	5
Risk					

- (B) also on a scale of 1-5, please rate how well you think that risk is currently being controlled in your workplace
(1= not at all well controlled, 5= very well controlled)

	1	2	3	4	5
Control					

- Q2 (A) Please give a rating of how high you perceive the level of risk to be for back pain in your workplace on a scale of 1 to 5 (1= very low risk, 5= very high risk)

	1	2	3	4	5
Risk					

- (B) also on a scale of 1-5, please rate how well you think that risk is being controlled in your workplace
(1= not at all well controlled, 5= very well controlled)

	1	2	3	4	5
Control					

- Q3 Please place a tick beside the statement which best describes the attitude of **senior management** towards health and safety

My senior management team fully support all health and safety initiatives and allocate sufficient resources and finances to ensure we implement the best procedures possible	
My senior management team are reasonably supportive of health and safety initiatives and allocate some resources and finances to ensure we implement some procedures	

My senior management team do not consider health and safety initiatives do be an important issues in the workplace and invest little or no resources and finances to ensure we implement the best procedures possible	
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Q4 Please place a tick beside the statement which best describes the attitude of **middle management** towards health and safety

Middle management within my organisation are fully supportive of all health and safety initiatives and help to ensure sufficient resources and finances are allocated to get the best procedures possible	
Middle management within my organisation are reasonably supportive of health and safety initiatives and will ensure that at least some resources and finances are allocated to health and safety	
Middle management in my organisation do not consider health and safety initiatives to be an important issues in the workplace and are not supportive in ensuring money and resources are allocated to health and safety initiatives	

Q5 Please place a tick beside the statement which best describes the attitude of your **colleagues** towards health and safety

The majority of my colleagues take health and safety seriously and as a result I do not find it difficult to promote health and safety procedures	
The majority of my colleagues do not take health and safety seriously and as a result I find it difficult to promote health and safety procedures	
The seriousness with which my colleagues take health and safety does not impact on my ability to promote health and safety procedures	

Your views on Backs! 2006

Q6 (A) On a scale of 1-10 please rate how useful you think the training you've had on the HSE Backs! 2006 initiative will be in relation to your workplace (1 being not at all useful and 10 extremely useful)

PLEASE TICK ONE

1 Not at all useful	2	3	4	5	6	7	8	9	10 Extremely Useful

(B) What did you find most useful?

(C) What did you find least useful?

Q7 (A) Are you planning to promote Backs! 2006 in your workplace?

YES

NO

(B) If YES – How do you plan to promote Backs! 2006 in your workplace?

(C) Within what kind of time scale would you be likely to start promoting Backs! 2006 in your workplace?

Within 2 weeks	
Within a month	
Within 3 months	
More than 3 months	

(D) Please tick which of the following you are likely to put forward to your Safety committee/ senior management

PLEASE TICK ALL THAT APPLY

Using the MAC assessment tool to identify risks and areas for improvement	
Redesigning processes or implementing new procedures around manual handling	
Buying new handling aids to avoid manual handling	
Starting new or update existing training programmes for employees around safe handling techniques	
OTHER – please write in any other activities	

(E) Please indicate whether the following factors have a positive impact, negative impact or no impact on your decision about whether or not to put forward new initiatives relating to Backs! 2006 to your Safety Committee/ senior management?

	Negative impact	No impact	Positive impact
Quality of the Backs! 2006 training			
Relevance to my organisation			
Financial expense			
Attitude of senior management			
Attitude of colleagues			
Unite Amicus endorsement of the campaign			
HSE endorsement of the campaign			
Other – please write in			

(F) If agreed by your safety committee/senior management, within what time frame could you envisage your organisation starting implementation of any new initiatives within your workplace relating to Backs! 2006?

Less than 1 month	
1 – 3 months	
3 – 6 months	
More than a year	

(G) If you had not received the training and accompanying material on Backs! 2006 today do you think you would be more, less or just as likely to promote the campaign in your workplace?

More likely	
Just as likely	
Less likely	

Q8 (A) Have you been aware of any previous HSE campaigns? E.g. Watch Your Step or Backs! 2005

YES
 NO

(B) If YES, how were you made aware of these campaigns?

Please tick all that apply

HSE publicity	
Unite Amicus promotion	
HSE website	
Unite Amicus website	
Word of mouth	
Other – please write in	

About you

Q9 (A) Please state your occupation e.g. scaffolder, teacher,

(B) Please state your position within your workplace e.g. team member, team leader, head of department

Q10 What industry are you employed in?

Please indicate which applies

Agriculture	
Fishing	
Mining and quarrying	
Manufacturing	
Utilities (Electricity, gas and water supply)	
Building trades (Construction – including demolition)	
Wholesale and retail trade	
Hotels and restaurants	
Transport, storage and communication	
Financial services	
Property (Real estate, renting and business activity)	
Central and local government	
Education	
Health and social work	

OTHER – please write in	
-------------------------	--

Q11 How many employees are there in your workplace?

Less than 50	
50-250	
250-1000	
More than 1000	

Q12 In which region is your workplace located? (please tick as appropriate)

North	
North West	
Yorks and Humberside	
West Midlands	
East Midlands	
Wales	
East Anglia	
Greater London	
South East	
South West	
Scotland	
Wales	
Northern Ireland	

Q13 How long have you been a health and safety representative in your current workplace?

Less than one year	
1-3 years	
3-5 years	
Longer than 5 years	

Q14 Before being a health and safety representative at your current workplace had you any previous involvement with health and safety?

NO	
YES	

If YES please state how long you have been involved in health and safety in your career

Less than one year	
1-3 years	
3-5 years	
Longer than 5 years	

Q15 Please tick which course you are attending and fill in the date of the course

	Course attended	Course date
Working Safely/risk assessment		
Managing Safely		
Organising for health and safety		

Q16 Please tick any courses you've attended previously

Working Safely/risk assessment	
Managing Safely	
Organising for health and safety	

Q17 Please complete the fill in your contact details

Address			
Building name/number			
Street			
Town			
County			
Post code			
Telephone number (please supply the number which it will be most convenient for us to contact you on and indicate the best time of day to reach you)	Tel. no.		
	Morning		
	Afternoon		
	Evening		

We will be conducting further research into the HSE Backs! 2006 initiative and will be contacting people to take part in a short follow-up survey in about 3 months

Please indicate how you would prefer to be contacted to take part in this survey

Telephone survey	
Postal survey	

6.4 PHASE 2 QUESTIONNAIRE

Unique ID

Name (please write in your full name)

Your use of Backs! 2006

Q1 Overall on a scale of 1-10, how useful have you found the Backs! 2006 training you received at the Unite Amicus health and safety workshop in helping you to promote back safety in your workplace?

1 Not at all useful	2	3	4	5	6	7	8	9	10 Extremely Useful

Q2 (A) Please tick which actions you plan to take, do not plan to take or have already taken in your workplace relating to back safety since your Unite Amicus Training course.
PLEASE TICK ALL THAT APPLY

	Do not plan to take this action	Plan to take this action in the future	Have already taken this action
Be involved in a workplace safety assessment			
Be involved in a workplace safety assessment using the MAC tool			
Raised a back safety plan of action			
Distributed and/ or put up back safety information			
Raised awareness of back safety issues among work colleagues			
OTHER – please write in any other activities			

Q2 (B) Do you think you would have taken/be planning to take the actions you've just indicated in the previous question even if you had not received information and training on Backs! 2006 on your Unite Amicus training course?

YES ALL	
YES SOME	
NO	
DON'T KNOW	

Q2 (C) **IF YES** – which actions would you have taken anyway?

	YES	NO	DO NOT KNOW
Been involved in a workplace safety assessment			
Been involved in a workplace safety assessment using the MAC tool			
Raised a back safety plan of action			
Distributed and/ or put up back safety information			
Raised awareness of back safety issues among work colleagues			
OTHER – please write in any other activities			

Q3 Please indicate which of the following statements best describe how the Backs! 2006 training has impacted on your ability to promote back safety in your workplace.

PLEASE TICK ALL THAT APPLY

Backs! 2006 training provided me with the information needed to assess risk and promote safe manual handling practices	
The Backs! 2006 training gave me greater confidence in assessing risk and promoting safe manual practices	
The Backs! 2006 training gave me greater authority in assessing risk and promoting safe manual practices	
The Backs! 2006 training has had no impact on my ability to assess risk and promote safe manual handling practices	
OTHER – please write in	

Q4 Has there been a change in how often you raise the issue of back safety with senior management, middle management and work colleagues since receiving the Backs! 2006 training?

	I raise back safety issues more frequently	There has been no change in how often I raise back safety issues	I raise back safety issues less frequently
Senior Management			
Middle Management			
Colleagues			

Q5 Please tick which of the following you have put forward to your Safety committee/ senior management *as a result of* the Backs! 2006 training you received at the Unite Amicus health and safety course. Please also state how long after the training course you raised this (e.g. 2 weeks, 1 month).

PLEASE TICK ALL THAT APPLY

		Length of time
Using the MAC assessment tool to identify risks and areas for improvement		
Redesigning processes or implementing new procedures around manual handling		
Buying new handling aids to avoid manual handling		
Starting new or update existing training programmes for employees around safe handling techniques		
OTHER – please write in any other activities		
No action as a result of the Backs!		

Q6 Please tick any of the following that have been implemented as a result of actions you have taken since receiving the Backs! 2006 training

	Please give a brief description
New manual handling procedure implemented	

New aids to avoid manual lifting bought	
Training programmes for employees around safe handling techniques have been initiated or updated	
Other- please write in	

Q7 Please indicate whether the following factors had a positive impact or negative impact on your ability to put forward new manual handling initiatives to your Safety Committee/ senior management?

	Negative impact	No impact	Positive impact
Quality of the Backs! 2006 training			
Relevance to my organisation			
Financial expense			
Attitude of senior management			
Attitude of colleagues			
Unite Amicus endorsement of the campaign			
HSE endorsement of the campaign			
Other			

If OTHER please write in any other factors

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Q8 Please state which, if any, of the accompanying Backs! 2006 materials you have used since the training course

DVD	
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Risk Assessment Chart	
Colour booklet	
None	

(B) Did the accompanying material make it easier for you to promote the campaign in your workplace?

Easier	
No difference	
More difficult	

Please fill in your contact details

Address	
Building name/number	
Street	
Town	
County	
Post code	
Telephone number (please supply the number which it will be most convenient for us to contact you on and indicate the best time of day to reach you)	Tel. no. <input type="text"/>
	Morning <input type="text"/>
	Afternoon <input type="text"/>
	Evening <input type="text"/>

We would like to contact you again in the future to get more information on your views of this initiative. Please indicate below if you would be happy to be contacted.

Happy to be contacted again	
Not happy to be contacted again	

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS QUESTIONNAIRE.
PLEASE USE THE PRE-PAID ENVELOPE AND POST IT BACK.

6.5 PHASE 3 SAFETY REP DISCUSSION GUIDE

	<ul style="list-style-type: none"> ▪ Introduction of Opinion Leader ▪ Thank them for all their support to date by filling out questionnaires and helping us to organise this workplace visit ▪ Explanation of research: ▪ Assure confidentiality – reiterate that the research is being conducted by market researchers not HSE staff. We will not be investigating workplaces. The identity of safety representatives, colleagues, employers and workplaces will remain absolutely anonymous and will not be passed on to the HSE ▪ Explain tape recording
	<ul style="list-style-type: none"> ▪ How long have you been a safety representative? ▪ How would you describe your role and responsibility as a safety representative? <ul style="list-style-type: none"> ○ What does being a safety representative mean in your organisation? <p><i>(USE THIS OPPORTUNITY TO PROBE AROUND HOW INFLUENTIAL THE SAFETY REP FEELS AND TO UNDERSTAND THE RESPONSIBILITIES PLACED ON THEM)</i></p> <ul style="list-style-type: none"> ▪ Is back safety an important issue in your workplace? Why, why not? <ul style="list-style-type: none"> ○ Do your colleagues take back safety seriously? ○ Does your senior management take back safety seriously? ▪ On a scale of 1 -5 (1 being very low and 5 being very high) how would you describe the level of back pain risk in your workplace? Why – MAKE SURE TO GET SPECIFICS? ▪ What back safety procedures do you currently have in place? (E.g. processes, aids to avoid manual handling, training programmes etc)
	<ul style="list-style-type: none"> ▪ Prior to attending the Unite Amicus training course and receiving the training on the Backs! initiative, was promoting back safety a priority for you in your role as safety representative? – Why? <ul style="list-style-type: none"> ○ Has back safety increased as a priority for you since receiving the training? Why? ▪ Now that you’ve been back from the course for a number of months what are your thoughts on the Backs! information and resources you received on the course? – SPONTANEOUS RESPONSE <p><i>YOU MAY NEED TO GIVE GENERAL PROMPTS ABOUT WHAT THE Backs! TRAINING INCLUDES</i></p> <ul style="list-style-type: none"> ▪ What, if anything, particularly stood out? <ul style="list-style-type: none"> ○ Why? ▪ Which parts, if any, were particularly useful? <ul style="list-style-type: none"> ○ Why was this particularly useful? MAKE SURE TO GET SPECIFICS

	<ul style="list-style-type: none"> ▪ Which parts, if any, did you find less useful? <ul style="list-style-type: none"> ○ Why was this particularly useful? MAKE SURE TO GET SPECIFICS ○ What, if anything, would have made it more useful? ▪ What actions have you taken as a result of going on the Backs! course <ul style="list-style-type: none"> ○ IF NECESSARY PROMPT FROM THE FOLLOWING: <ul style="list-style-type: none"> ▪ Been involved in a workplace safety assessment? ▪ Been involved in a workplace safety assessment using the MAC tool ▪ Raised a back safety plan of action ▪ Distributed or put up back safety information ▪ Raised awareness of back safety among work colleagues ▪ FOR ACTIONS NOT TAKEN PROBE FOR REASONS: Why did you not take these actions? <ul style="list-style-type: none"> ○ Was there anything that prevented you from taking these actions? ○ What, if anything, could be done to make you more likely to take these actions? ▪ As a result of Backs! what recommendations, if any, have you put forward to your safety committee, senior management? <ul style="list-style-type: none"> ○ IF NECESSARY PROMPT FROM THE FOLLOWING: <ul style="list-style-type: none"> ▪ Using the MAC assessment tool to identify risks and areas for improvement ▪ Redesigning processes or implementing new procedures around manual handling ▪ Buying new handling aids to avoid manual handling ▪ Starting new or updating existing training programmes for employees around safe handling techniques ○ When did you put forward these recommendations? ○ Why did you feel that it was necessary to put forward these recommendations? <ul style="list-style-type: none"> ▪ PROBE for risks that needed rectifying ▪ What response did you receive from the safety committee/ senior management about your recommendations? ▪ Have any of your recommendations been implemented? <ul style="list-style-type: none"> ○ IF YES: How long did it take from when you raised the issue till implementation? ○ Can you run me through the process from when you raised the issue till it was implemented? ○ IF NO: What was the reaction? ○ Why do you think the recommendation was not implemented? <ul style="list-style-type: none"> ▪ What reason was given for non-implementation? ▪ What do you think would need to happen before this recommendation could be implemented? ▪ Would you have made recommendations if you had not received the Backs! information on the Unite Amicus training course?
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	<ul style="list-style-type: none"> ▪ Are there any other recommendations that you would like to put forward that you have not done so already? ▪ What, if any, impact has Backs! made on your ability to promote back safety in your workplace? <ul style="list-style-type: none"> ○ IF NECESSARY PROMPT: Confidence, Authority, Information ▪ Has Backs! had any effect on the way that you communicate with your colleagues? <ul style="list-style-type: none"> ○ Has there been a change in the amount that you speak to your colleagues about back safety issues? <ul style="list-style-type: none"> ▪ IF A CHANGE/ EFFECT: What sort of response do you get from your colleagues? ▪ Has Backs! had any effect on how you raise back safety issues with your safety committee/ senior management? <ul style="list-style-type: none"> ○ Has there been a change in the amount that you raise back safety issues with your safety committee/ senior management? <ul style="list-style-type: none"> ▪ IF A CHANGE/ EFFECT: What sort of response do you get from your safety committee/ senior management?
	<ul style="list-style-type: none"> ▪ Are you aware of any other HSE Back Safety campaigns/ information drives? <ul style="list-style-type: none"> ○ IF YES: What campaigns/ information are you aware of? ▪ What, if any, difference do you think it makes that the HSE has created the Backs! information and resources? ▪ Do you think it is a good idea for the HSE Backs! training to be included in an Unite Amicus training course? Why, why not? ▪ What effect, if any, do you think your Unite Amicus Union membership has on your ability to promote good back safety? <ul style="list-style-type: none"> ○ Do you think your position is taken more/ less/ equally seriously because you are an Unite Amicus rep/ have been on an Unite Amicus training course?
	<ul style="list-style-type: none"> ▪ Thinking about everything we've discussed, do you think that the information on the HSE Backs! campaign that you received on the Unite Amicus training course has had a significant impact on attitudes towards back safety in your workplace? Why? ▪ Thank & close

6.6 PHASE 3 EMPLOYER DISCUSSION GUIDE

	<ul style="list-style-type: none"> ▪ Introduction of Opinion Leader ▪ Thank them for supporting us in this research ▪ Explanation of research: please be very clear – we are looking at whether and how the reps have raised awareness of Backs! and effected appropriate change (perhaps with a brief explanation of what a safety rep is, that in this workplace Unite Amicus the union has appointed reps) ▪ Assure confidentiality – reiterate that the research is being conducted by market researchers not HSE staff. We will not be investigating workplaces. The identity of safety representatives, colleagues, employers and workplaces will remain absolutely anonymous and will not be passed on to the HSE ▪ Explain tape recording
	<ul style="list-style-type: none"> ▪ Tell us about your workplace and your role and responsibilities? <ul style="list-style-type: none"> ○ What industry do you work in? ○ How many employees overall within the organisation– how many on this site? ▪ Is back safety an important issue in your workplace? Why, why not? ▪ Does your corporate health and safety policy include back safety? <ul style="list-style-type: none"> ○ IF YES: What is your corporate policy regarding back safety? ○ IF NO: PROBE why not? ▪ How do you currently evaluate back safety within the workplace? ▪ What back safety procedures do you currently have in place? (E.g. processes, aids to avoid manual handling, training programmes etc) ▪ How do you decide whether to implement new safety procedures/ practices within your workplace? <ul style="list-style-type: none"> ○ Who would typically initiate a change? ○ What process do you go through? <ul style="list-style-type: none"> ▪ Is there a safety committee? ▪ Do you actively involve workers and/or safety representatives?
	<ul style="list-style-type: none"> ▪ How would you describe the role of the safety representative within your organisation? (N.B. SPECIFICALLY ABOUT THE SAFETY REP WHO ATTENDED THE UNITE AMICUS COURSE) ▪ Are there any other safety representatives in your workplace? <ul style="list-style-type: none"> ○ IF YES: How does the Unite Amicus safety rep’s role fit with the others? ▪ What contact do you have with them in relation to safety issues? ▪ Do you think the safety rep in your workplace helps to raise H&S issues with colleagues and managers? ▪ What are your expectations around their role? <ul style="list-style-type: none"> ○ PROBE AROUND: How proactive they expect their safety representative to be in suggesting changes/improvements, promoting campaigns, training employees etc.

	<ul style="list-style-type: none"> ▪ What role do you think that the safety representative should have regarding ensuring safe back practices? <ul style="list-style-type: none"> ○ PROBE AROUND: How much power and influence they feel that the safety representative should have ▪ What do you think are the main barriers for your safety rep in attempting to change the processes and behaviours around back safety in your workplace?
	<ul style="list-style-type: none"> ▪ Are you aware of the HSE campaign around back safety? <i>YOU MAY NEED TO PROMPT ABOUT THE Backs! CAMPAIGN</i> <ul style="list-style-type: none"> ○ IF YES: How did you find out about it and what do you know about this? ○ IF YES: What do you think about it? ▪ Are you aware of your safety representative using HSE Backs! information and resources to promote good back safety within your organisation? If YES: <ul style="list-style-type: none"> ○ What are you aware of (e.g. new risk assessment procedures, using the MAC tool etc.)? ○ What kind of impact do you think this has had on helping to control risk of back injury in your workplace? (E.g. changes in behaviour, procedure or attitudes towards back safety) ○ Does the fact that the information around back safety that's been introduced by your Unite Amicus safety rep, comes from the HSE have positive/negative/no impact on the level of change that has taken place in the organisation around back safety – even if that change is just attitudes towards back safety? <p><i>USING RELEVANT INFORMATION FROM THE SAFETY REPS RETURNED QUESTIONNAIRES:</i></p> <p>FOR ACTION DIRECTED AT COLLEAGUES (e.g. distributed or put up back safety information/ raised awareness of back safety among colleagues):</p> <ul style="list-style-type: none"> ▪ Your safety rep tells us that they have done XXX <ul style="list-style-type: none"> ○ What do you think about this action? ○ Do you think this action is likely to have an effect on fellow colleagues? <ul style="list-style-type: none"> ▪ Why, why not? <p>FOR INITIATIVES RAISED WITH SAFETY COMMITTEE/ SENIOR MANAGEMENT (e.g. using the MAC assessment tool to identify risks and areas for improvement, redesigning processes or implementing new procedures around manual handling, buying new aids to avoid manual handling, starting new or updating existing training programmes around safe handling techniques):</p> <ul style="list-style-type: none"> ▪ Your safety rep says that they raised the idea of XXX with the safety committee/ senior management? <ul style="list-style-type: none"> ○ What did you think of the suggestion?

	<ul style="list-style-type: none"> ○ If you have not done so already do you have plans to implement it? Why/why not? <ul style="list-style-type: none"> ▪ IF NOT: What, if anything, would need to change before this would be implemented?
	<ul style="list-style-type: none"> ▪ Thinking about everything we've discussed, do you think that the information on the HSE Backs! campaign that your safety rep received on the Unite Amicus training course has had a significant impact on attitudes towards back safety in your workplace? Why? ▪ What suggestions do you have for how the campaign could have had more impact on attitudes to back safety in your workplace? ▪ Thanks ▪ Close

6.7 PHASE 3 EMPLOYEE DISCUSSION GUIDE

	<ul style="list-style-type: none"> ▪ Introduction of Opinion Leader ▪ Thank them for supporting us in this research ▪ Explanation of research: please be very clear – we are looking at whether and how the reps have raised awareness of Backs! and effected appropriate change (perhaps with a brief explanation of what a safety rep is, that in this workplace Unite Amicus the union has appointed reps) ▪ Assure confidentiality – reiterate that the research is being conducted by market researchers not HSE staff. We will not be investigating workplaces. The identity of safety representatives, colleagues, employers and workplaces will remain absolutely anonymous and will not be passed on to the HSE ▪ Explain tape recording ▪ Brief participant introductions: Role and length of time in organisation
	<ul style="list-style-type: none"> ▪ Is back safety an important issue in your workplace? Why, why not? <ul style="list-style-type: none"> ○ On a scale of 1 to 5 (1 being very low risk and 5 being very high risk) how would you rate the level of back risk in your workplace? ▪ Is back safety something that you think about in your day-to-day job? <ul style="list-style-type: none"> ○ If yes – in what way? ▪ How well controlled do you feel the level of risk of back injury is in your workplace? ▪ Based on your knowledge and experience of back safety procedures in your workplace, how seriously do you think your senior management take the issue of back safety? <ul style="list-style-type: none"> ○ PROBE for specifics ▪ What back safety procedures are you aware of in your workplace? (E.g. processes, aids to avoid manual handling, training programmes etc) <ul style="list-style-type: none"> ○ What difference do these make? ○ Are there any/ any other procedures you would like to see introduced? Why? ▪ How do new safety procedures get implemented within your organisation and who do you think is responsible for initiating new procedures? <ul style="list-style-type: none"> ○ PROBE for awareness of the process by which procedures are implemented?
	<ul style="list-style-type: none"> ▪ Are you aware of the safety rep in your workplace? <ul style="list-style-type: none"> ○ IF YES: How much and what type of contact do you have with them? ○ IF NO: Why do you think that you are not aware of them? <p><i>PROBE: How satisfied they are with the amount and type of contact they have with the safety representative</i></p>

	<ul style="list-style-type: none"> ▪ Does your safety representative raise the issue of health and safety with you and your colleagues in your workplace? <ul style="list-style-type: none"> ○ How do they raise the issue? (e.g. posters, talks, one-on-one discussion) ▪ Do you speak to them about health and safety concerns? ▪ How would you describe the role of the safety representative within your organisation? ▪ What effect, if any, do you think that they have on the health and safety of your workplace? ▪ Are you aware of how your safety representatives communicate with senior management? ▪ What role do you think that the Unite Amicus safety representative should have regarding ensuring safe back practices? <ul style="list-style-type: none"> ○ Would you like them to do more/less/different? ○ PROBE AROUND: How proactive they expect their safety representative to be ▪ What do you think are the main barriers for your Unite Amicus safety rep in attempting to change the processes and behaviours around back safety in your workplace?
	<ul style="list-style-type: none"> ▪ Are you aware of the HSE campaign relating to back safety? <p><i>YOU MAY NEED TO PROMPT ABOUT THE Backs! CAMPAIGN</i></p> <ul style="list-style-type: none"> ○ IF YES: How did you find out about it and what do you know about this? ○ IF YES: What do you think about it? <ul style="list-style-type: none"> ▪ Are you aware of any HSE Backs! information promoting good back safety being available/visible within your organisation? ▪ Have you noticed any new general information or new procedures relating to back safety being implemented in your workplace in the last X months? (check how long ago the relevant safety rep attended the Unite Amicus training course) <p><i>USING RELEVANT INFORMATION FROM THE SAFETY REPS' RETURNED QUESTIONNAIRES:</i></p> <p>FOR EACH ACTION DIRECTED AT COLLEAGUES (e.g. distributed or put up back safety information/ raised awareness of back safety among colleagues): This is the key section, here</p> <p>Your Unite Amicus safety rep tells us that they have done XXX</p> <ul style="list-style-type: none"> ▪ Are you aware of this taking place? <ul style="list-style-type: none"> ○ How have you been made aware of this? ○ Is this something that you think that all your colleagues have been made aware of? ▪ What do you think about them doing this? <ul style="list-style-type: none"> ○ Do you agree with your safety representative doing this? Why, why not? ○ How important do you think this action is? Why? ▪ What difference, if any, has this made to you?

	<ul style="list-style-type: none"> ○ Has it had any effect on the way you behave? PROBE FOR SPECIFICS <ul style="list-style-type: none"> ▪ IF NOT: Why has it made no difference? What needs to be changed before this action would make a difference ▪ What difference if, any, do you think this will make on your colleagues? <ul style="list-style-type: none"> ○ Do you think that this action will have an impact on how everyone else behaves? ▪ Is there any other action that you think your safety representative could do that would have a positive impact on back safety? ▪ Have you recently noticed any other back safety information in your workplace? <ul style="list-style-type: none"> ○ How long ago did you notice this? ○ What is this information about? ▪ Has any of this information you've seen or heard had any impact on your behaviours and work practice regarding back safety? <ul style="list-style-type: none"> ▪ IF YES: What impact has it had? ▪ IF NO: Why not?
	<ul style="list-style-type: none"> ▪ In summary, thinking about everything we've discussed, do you think that the information on the HSE Backs! campaign that your Unite Amicus safety rep received on the Unite Amicus training course has had a significant impact on attitudes towards back safety in your workplace? Why? ▪ What suggestions do you have for how the campaign could have had more impact on attitudes to back safety in your workplace? ▪ Thank & close

HSE Better Backs 2006: Worker involvement evaluation

Research with Unite Amicus safety representatives

This report covers the findings of a project which gathered evidence about the effectiveness of Unite Amicus union safety representatives in delivering HSE campaigns in the workplace. The project took the form of three distinct phases running from January 2006 to February 2007 using both quantitative and qualitative research techniques. The findings provide strong evidence that promoting HSE initiatives via Unite Amicus training courses is an effective way of enabling and encouraging representatives to take action in the workplace. The research also highlighted the range of variables that impact the extent to which a rep took action and the extent to which their actions impacted on the wider workplace. In addition the research found that although back safety is already an important issue that is well controlled for a number of workplaces, the training still benefited these workplaces by exposing representatives to new ideas on how to manage the risks around back safety, and for some it has raised the issue of back safety up the H&S agenda.

This research was commissioned by COI on behalf of HSE. This report and the work it describes were funded by the Health and Safety Executive (HSE). Its contents, including any opinions and/or conclusions expressed, are those of the author alone and do not necessarily reflect HSE policy.