

Health and Safety Excellence program

Sample topic evidence stories



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Information about this document

This document contains examples of Health and Safety Excellence program (HSEp) evidence submissions that are based on activities reported by program members.

As you complete each topic in your action plan, you need to write an “evidence story” that describes how you developed and implemented it in your workplace. Then, you’ll need to submit that evidence story to the WSIB for validation. Each example in this document shows how the member developed the selected topic according to the Plan-Do-Check-Act (PDCA) cycle or the WSIB’s five steps in managing health and safety.

The examples in this document might be helpful to you when you’re preparing your own topic evidence stories.

To assist you with navigating this document, we have included a clickable Table of Contents as well as a blue **Return to table of contents** button at the bottom of every page. As digital guides are still quite a new phenomenon, we’d love your suggestions for how to improve our digital design; please contact us at healthandsafetyexcellence@wsib.on.ca.

Uploading the best evidence to support your story

To support your evidence story and show that your topic has been developed and implemented, you’ll need to upload files to our digital tool. These files need to support your evidence story and help to explain how the work you’ve completed makes your business safer. Your provider will review your submission before it’s sent to the WSIB for validation.

You have the flexibility to choose up to five evidence files to show your work. When selecting evidence to submit, you may choose from various formats, including videos and images. Please provide clear, concise evidence that demonstrates the completion of your topic, and not lengthy documentation like your company’s health and safety manual or extensive records. We’re not looking for proof of compliance with basic health and safety requirements but rather that each of your topics are “living and breathing,” meaning they are integrated and consistently practiced throughout your organization, resulting in a healthier and safer workplace.

Please note: We’ve provided the examples below for guidance purposes only. The way you implement your topics will be guided by the needs of your business, so we encourage you to tell

us *your* unique story. Please [login to the digital tool](#) to see the [Step 2: Develop guide and Step 3: Demonstrate guide](#) for additional support on writing an evidence story.

If you have questions about HSEp or your membership, please either reach out to your provider, or email us at healthandsafetyexcellence@wsib.on.ca – we're here to help.

HSEp Health safety topics guide

The [HSEp Health and safety topics guide](#) provides more specific information about topic requirements to help you prepare for the evidence submission and validation process. Please consult this guide on the digital tool and speak with your provider to learn more.

List of commonly-used abbreviations

COR™	Infrastructure Health and Safety Association Certificate of Recognition
EHS	Environment, Health and Safety
H&S	Health and Safety
HSEp	Health and Safety Excellence program
HSMS	Health and Safety Management System
HSR	Health and Safety Representative
JHSC	Joint Health and Safety Committee
MLITSD	Ministry of Labour, Immigration, Training and Skills Development
PDCA	Plan-Do-Check-Act cycle
RTW	Return to Work
WSIB	Workplace Safety Insurance Board

Level 1 – Foundation topics

Leadership and commitment

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

- Our engagement survey resulted in several questions from employees that required additional attention. We held a health and safety town hall on September 9, 2020. The town hall was used as a forum for management to discuss our commitment to health and safety, and to encourage health and safety discussions among all company levels. We will continue to have a health and safety town hall annually.

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

Samples of evidence files to support the story:

- Video of our senior leader committing to health and safety
- Picture of health and safety board with policies shown
- Employee engagement survey questions
- Email of policies that was sent to all employees

Health and safety responsibilities

Sample evidence submission:

Plan / Set a standard

- We had no formal, written policy that outlined each of our employees' health and safety responsibilities. We know this is required under the Occupational Health and Safety Act. Our first step was to review human resources documentation of employee, contractor, and visitors' necessary health and safety responsibilities.
- Our vice president and our health and safety representative (HSR) drafted a Health and Safety Responsibilities Policy, which our president approved on March 11, 2021.

Do / Communicate and Train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Health and Safety Responsibilities Policy
- Videos from employees talking about their specific health and safety responsibilities
- Picture of health and safety board
- Samples of health and safety awareness in four steps certificates

Health and safety communication

Sample evidence submission:

Plan / Set standard

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

Do / Communicate and train

- Our Health and Safety Excellence program (HSEp) provider delivered online communications training to our management team.
- We sent monthly emails to employees that included health and safety updates. We tracked the emails to ensure messages were received, read and acknowledged.
- We inserted health and safety updates in payroll envelopes once a quarter.
- We hung posters and health and safety signage in offices.
- Supervisors held weekly "toolbox" talks with their teams to discuss health and safety topics (e.g. mental health, COVID-19, pre-use inspections, etc.).

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Screen shots of our unique online portal, showing employee health and safety questions, and management's response
- Quarterly payroll inserts
- Health and safety email updates and tracking results
- JHSC quarterly meeting minutes with text highlighted related to health and safety communication
- Annual health and safety meeting minutes – showing a review of the health and safety communication protocol

Health and safety participation

Sample evidence submission:

Plan / Set standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Pictures of employees participating in a risk assessment
- Training records, including names and signatures
- Evaluation questionnaire
- Video of a toolbox talk with supervisor and workers discussing health and safety
- Monthly safety meeting minutes, agenda and signatures

Recognition of hazards

Sample evidence submission:

Plan / Set a standard

- Some of our goals were to:
 1. Develop a program for the recognition of hazards as well as a risk assessment process.
 2. Complete an initial plant-wide job hazard analysis.
 3. Create a central location to store information on each hazard.
- Hazard analysis between January and March 2020 was primarily done through independent observation of work and interactions with employees to ensure they were actively involved in identifying hazards.
- Once we were satisfied that all the hazards were appropriately identified, our policy was written and approved on January 5, 2020.

Do / Communicate and train

- We held weekly hour-long communication meetings with all senior leaders, supervisors and many key supports to review and discuss the status of ongoing projects.
- During the week of April 10, 2020, all employees received training on requirements to report hazards and record documentation.
- The Joint Health and Safety Committee (JHSC) members receive ongoing training to improve their hazard recognition skills and how to complete monthly workplace inspections.
- On May 19, 2020, as part of our ongoing training program, we ran hazard recognition and risk assessment training sessions for our lead hands.

Check / Evaluate

- The monitoring of our hazard recognition and risk assessment process took place through several methods:
 1. We held weekly safety meetings to discuss ongoing work to find hazards and update the tracking sheets.
 2. The Health and Safety Specialist completed daily safety reports and regular weekly reviews of safety reports, including any identified hazards. We posted the minutes of those meetings on our health and safety board for employees to review.
 3. On November 5, we completed an annual evaluation. Workplace inspections were done monthly by the JHSC, and we posted those reports.

Act / Acknowledge success and/or make improvements

- Each year we have an annual health and safety meeting/holiday celebration. We recognize and reward employees for their participation in the program through gift cards and a thank you letter.
- We also posted a congratulatory note on our health and safety board.

Samples of evidence files to support the story:

- Hazard Recognition and Risk Assessment program policy
- Orientation training slides on hazard reporting procedures
- Completed training sign off sheets
- Picture of project status posted on plant communication board

Risk assessment

Sample evidence submission:

Plan / Set a standard

- We didn't have an existing risk assessment procedure, policy or registry, which is a step in our journey towards achieving COR™ certification.
- We used the [WSIB's Workwell evaluation tool](#) to find what was missing in our risk assessment program.
- Our Risk Assessment Policy, control procedures, and hazard registry were written by our Joint Health and Safety Committee (JHSC) and were approved by our president on April 19, 2020.
- Our risk assessment procedure outlined a five-step process:
 1. Identify all workplace hazards
 2. Decide who might be harmed and how
 3. Evaluate the risks and decide on control measures
 4. Record findings and implement them
 5. Review the assessment and update, if necessary

Do / Communicate and train

- We held weekly one-hour communication meetings with senior leaders, supervisors, and critical support employees to discuss reporting and identifying hazards and ideas to control or prevent them.
- We trained all employees on the requirements to report hazards, the identification of possible risks and how to document. The JHSC members received practical training provided by our program provider on June 20, 2020, to improve their risk assessment and hazard identification skills. Our JHSC co-chairs participated in additional risk assessment training through our Health and Safety Excellence program (HSEp) provider.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Risk assessment policy and control procedures
- Sample training materials from June 20, 2020 training for JHSC members
- Video of JHSC members conducting a risk assessment
- Job hazard and risk assessment analysis and pre-job assessment form
- Sample completed risk assessment forms and topic evaluation

Control of hazards

Sample evidence submission:

Plan / Set a standard

- It was necessary to address the risks of the COVID-19 virus and create a protocol to manage those risks, prevent the spread to our team, and reduce community transmission. We worked with Public Health Ontario, our local health unit, and our Joint Health and Safety Committee (JHSC) to gather the information needed to develop the protocol.
- This was a new initiative for our company. The goal was to comply with our local health unit and provincial directives, and ensure our employees were fully aware of our processes and responsibilities.
- Our first step was to conduct a risk assessment on all our operations due to COVID-19. On April 6, 2020, we reviewed each job and its processes to assess the risks of contracting COVID-19. Our management team and employee members completed the risk assessment process by identifying all our job tasks and the associated risks of contracting the virus at each job task. We worked with our program provider to develop a scale to outline the chance of getting the virus for our employees, and then created a plan to set controls for jobs that had an exposure risk. See our attached evidence for the plan and control protocols.

Do / Communicate and train

- We communicated to our employees using emails, text messages in our group chat and posters to ensure they had the most up-to-date information. We made sure our team understood the symptoms of COVID-19, how it's transmitted, and ways to reduce the risk. Consistent and ongoing communication was necessary to make sure our employees understood that we would protect their health during the pandemic and create the safest workplace.
- We helped employees prepare for training by emailing the protocol and sharing the process for preventing COVID-19 on May 1, 2020. Due to COVID-19 restrictions, in-person training was not possible, so we provided mini digital training sessions through an online platform.

Check / Evaluate

- We evaluated the new COVID-19 protocol on September 5, 2020. We reviewed incident reports, monthly workplace inspections and employee survey results to assess whether any exposure to COVID-19 occurred and if employees understood the protocol correctly.
- We did not find any gaps and therefore did not need to make any changes.
- Team check-ins have also been utilized to evaluate how COVID-19 has impacted employees' well-being, collect feedback on managing changes at work and determine if additional changes need to be made for a safe and healthy workplace.

Act / Acknowledge success and make improvements

- We have had no compliance issues with our employees and no COVID-19 health and safety violations. All employees review their health and safety performance as part of their year-end reviews. This year, we highlighted that all employees have been following the protocol. There have been no work-related COVID-19 cases or exposures.
- We have also recognized that COVID-19 has significantly impacted our team's mental health and have offered our employees extra mental health days off with pay.

Samples of evidence files to support the story:

- Copy of COVID-19 management protocol
- Photographs of sanitizing programs, signage, assessment stations
- Video of staff explaining PPE requirements
- Completed hazard assessment and control protocol plan
- PowerPoint training slide deck

Injury, illness and incident reporting

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act/ Acknowledge success and/or make improvements

- The corrective actions implemented as a result of the evaluation included posting safe lifting techniques on the Health & Safety Communication Board and discussing them in a weekly team meeting on May 19, 2021, immediately following an incorrect lifting incident.
- There have been no other incidents to report to date. However, we will continue to monitor the success of this program to make sure the procedure is followed.

- We sent a thank-you email to all employees for their participation in the program and for helping to make our organization healthier and safer.

Samples of evidence files to support the story:

- Injury, Illness and Incident Reporting Policy and Procedure
- Audio recording of tool-box talk
- PowerPoint slide deck – incident illness and injury reporting training
- Training attendance report – names and signatures
- Evaluation questionnaire

Incident investigation and analysis

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Completed injury, illness and incident investigations
- Completed investigation checklist
- Employee incident report form
- Video of supervisor providing overview of incident investigation process and forms

First aid

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and Train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- First Aid Policy and Procedures
- First Aid training certificates
- Picture of kits and first aid station and filled out logbook
- Picture of first aider names on safety board
- Picture of TV in lunch room with first aid announcement

Level 2 – Intermediate topics

Competency

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Health and Safety Competency Policy, and training matrix
- Samples of role-specific competency profiles
- Video of employee outlining their competency requirements
- Training presentation and attendance list
- Annual health and safety audit – health and safety competency program

Health and safety training

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Health, Safety and Wellness Training and Education Policy
- Health and safety certification, skills and training matrix
- Video of employee outlining their competency requirements
- Training presentation and attendance list
- Copy of annual health and safety audit – health and safety training program

Legal and other requirements

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Compliance to Legal and Other Requirements Policy and Procedure
- Registry that shows the application of legal and other requirements for our business, and a review checklist
- Pictures of employees being trained in first aid, forklift operations and lift truck
- Copies of training certificates

Health and safety accountabilities

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

- We sent an email communication to all employees on April 2, 2020, and updated our health and safety binders and internal website.
- We updated the descriptions of all of our jobs to include health and safety accountabilities, including the requirement to participate in our internal responsibility system.
- Employees reported a slipping hazard by using a new online hazard reporting form we created. The report was automatically sent to the manager for action. The supervisor purchased anti-slip shoes for all employees.
- Health and safety accountabilities were reviewed during our May 13, 2020, annual health and safety training.
- Quarterly safety meetings were held to monitor and review health and safety accountabilities among employees. A standing agenda item was added to discuss whether and how managers were consistently following up on health and safety complaints.

Check / Evaluate

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

Act / Acknowledge successes and/or make improvements

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

Samples of evidence files to support the story:

- Health and Safety Responsibilities Policy
- Email communication to all employees
- Picture of health and safety board
- Training log and signatures

Emergency prevention and preparedness

Sample evidence submission:

Plan / Set a standard

- Like many businesses, we were not fully prepared when the COVID-19 pandemic hit. We did not have a defined emergency prevention or response plan in place. We needed to ensure our business was ready and prepared to prevent possible emergencies via emergency prevention and response plans.
- First, our Joint Health and Safety Committee (JHSC) held a planning meeting to identify all possible emergencies our business could face. We then developed plans and protocols for each specific situation to educate employees on their responsibilities, hazards, how to prevent an illness or outbreak and steps to take in an emergency. We then developed an emergency-specific protocol book, which was given to all employees.
- The policies and procedures were approved on June 1, 2020.

Do / Communicate and train

- We initially communicated to all employees by email that we were developing our health and safety program. Since employees were already receiving daily email updates during the COVID-19 pandemic, this was the preferred method of communication. We advised that we would be training all employees on full emergencies and discussing their roles and responsibilities with their supervisors to prepare for training.
- A copy of the emergency-specific protocols was included in our health and safety policy binder, and a protocol booklet was provided to everyone in the company.
- All subcontractors and workplace parties were notified and received information on our emergency-specific procedures. They were required to sign-off that they had read and understood the health and safety protocols. A copy of site-specific emergency protocols is kept at each site.
- We created muster stations and provided employees with a phone number to contact for updates during emergencies
- Fire drills and mock evacuations were held on July 19 and September 4, 2020.
- To prevent the spread of communicable diseases, we set up a series of hand sanitizer stations around our office. We implemented a masking requirement for indoor operations.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Emergency-specific protocols, policy and procedures
- Video of fire drill in action
- Picture of emergency-specific protocols book at site office
- Training records and copy of evaluation results
- Copy of JHSC quarterly meeting minutes

Emergency response

Sample evidence submission:

Plan / Set a standard

- Our management and health and safety teams specifically selected this topic to address a gap in our health and safety program. Our business has a well-established practice for evacuating the building and fire response practices. Still, no formal policies or procedures are in place regarding other emergencies.
- We planned to conduct three fire drills, a mock evacuation, and a test emergency lockdown to implement our policies and procedures further.
- Our CEO approved our Emergency Response Policy and Procedures on January 17, 2020.

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

- As part of our evaluation process, the JHSC discovered some areas that could be improved and created a continuous improvement plan (CIP). One identified improvement was to ensure our hand sanitizers are checked monthly.

- We initiated tasks on the CIP on December 1, 2020, and have timelines to ensure that they are completed by February 1 of next year.

Samples of evidence files to support the story:

- Emergency Response Policy
- Completed risk assessments and hazard reporting forms
- Picture of response plan
- Completed copies of evaluation questionnaire
- Continuous improvement plan

Return-to-work program requirements, forms and tools

Sample evidence submission:

Plan / Set a standard

- We didn't have an existing return-to-work (RTW) program.
- We were experiencing increasing claims as a result of work-related injuries. We designed our RTW program to help return us to regular operations especially since some employees were off sick due to COVID-19.
- Our RTW policies, procedures and documents were developed by the Joint Health and Safety Committee (JHSC). We created templates for managing a RTW plan and supporting documentation such as sample accommodation requests, incident reporting forms, and evaluation plans.

Do / Communicate and train

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

Check / Evaluate

- Random interviews about the RTW program and procedures were completed in July and August 2020. The results were communicated to the managers and the JHSC. The minutes of those meetings and the results were shared with all employees.
- All incidents that required a RTW plan were evaluated during our Joint Health and Safety Committee meeting in September 2020. We checked to determine if our RTW policies, procedures, forms and tools were utilized correctly in each case.
- We found that the procedures didn't have a dispute resolution process as per the topic requirements.

Act / Acknowledge success and/or make improvements

- A dispute resolution process was added, and we provided additional training on December 10, 2020.

- A thank-you letter was sent to all employees, signed by our owner.

Samples of evidence files to support the story:

- Copy of our Return-to-work Planning Policy and related forms
- Training attendance sheet
- Video of employee explaining their role in the RTW process
- Completed RTW forms and sample RTW plan
- September 2020 JHSC meeting minutes showing where the topic was reviewed

Return-to-work roles and responsibilities

Sample evidence submission:

Plan / Set a standard

- Our previous return-to-work (RTW) program had gaps. We needed to ensure all employees were fully aware of our RTW processes and shared responsibilities.
- RTW roles and responsibilities were created in our first quarter Joint Health and Safety Committee (JHSC) meeting. We assigned roles and responsibilities for all parties and created the position of return-to-work coordinator. We included a matrix of defined roles and responsibilities in our return-to-work policies and procedures.

Do / Communicate and train

- We provided a letter with a sample of our RTW program, including our shared responsibilities, in each employee's pay on the first payday in February 2020.

A copy of the policy was also posted in the workplace on our health and safety boards and in all occupational health and safety binders to make sure it was available to all employees.

RTW Roles and responsibilities documents were made available in our first aid room.

- On March 4, 2020, the JHSC, in conjunction with leadership, held training sessions for all employees. Supervisors were instructed on when and how to contact an employee after an injury has occurred. RTW roles and responsibilities of all workplace parties were described in detail.
- Following an injury at work on March 19, 2020, our return-to-work coordinator was able to try out the newly defined roles and responsibilities.
 - For example, she contacted the injured person by phone on the same day. The injured person was able to obtain appropriate medical information and help identify possible accommodations at work.
 - A RTW planning meeting took place where the injured person and their manager worked together to find a suitable position, so there was no time lost from work.
 - Weekly RTW follow-up meetings took place, and a closure meeting was held on May 10, 2020.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

- Our return-to-work coordinator developed additional RTW responsibilities based on the above evaluation which were re-communicated to all relevant staff.

- The policy will be reviewed every three years, or whenever an opportunity for improvement is reported or identified.

Samples of evidence files to support the story:

- RTW roles and responsibilities policies and procedures
- Roles & responsibilities matrix
- Samples of completed RTW forms
- RTW & safety orientation training and follow up with employees
- Worker testimonial video

Accommodation and return-to-work plans

Sample evidence submission:

Plan / Set the standard

- We wanted a program that supports our employees and helps them return to work following an injury or illness.
- By facilitating an early, safe and suitable return to work (RTW), we are also meeting our legal responsibilities as set out in the following legislation governing workplaces: the [Ontario Human Rights Code](#) (s.13), the [Workplace Safety and Insurance Act](#) (s.40,41), the [Accessibility for Ontarians with Disabilities Act](#) (s.7) and the [Occupational Health and Safety Act](#), (s.25).
- The first step was for our health and safety manager to draft a RTW Accommodations policy. All employees were provided an opportunity to give feedback and ask questions about the draft policy. After incorporating the suggestions into a final draft, our CEO reviewed and approved the policy on March 30, 2020.
- We had a third-party ergonomist come in and review all jobs to help identify each position's physical and cognitive demands. We built an inventory of modified work options for typical injuries for the medical professionals.
- We created sample letter templates that are used in the event of a workplace injury. A package with these documents is kept in the first aid room for easy access. A similar package was developed for non-work-related injuries/illnesses.
- We included a requirement in the policy for weekly meetings between the employee and the supervisor.

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Accommodation/RTW Policy and Procedure
- Sample RTW package for employees (letter to worker, treating medical professional physical/cognitive demands, sample modified jobs available)
- RTW/Accommodation training slides and attendance lists
- Copy of RTW evaluation audit
- Video testimonial from accommodated employee

Pre-use inspections

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

- We communicated our pre-use policy to all employees via toolbox talks and monthly safety meetings. We determined that an all-in-one inspection checklist would be the best tool for us, and that it would consistently help employees perform pre-use inspections.
- We began implementing our pre-use inspection forms and safe operating procedures in April. Our crews completed the necessary documents and then sent them to management to ensure they're stored correctly.
- All failed pre-use inspections are posted on our health and safety board, and equipment is immediately locked out.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Copy of Pre-use Inspection Policy
- Video of employee completing a pre-use inspection
- Copies of completed inspection reports
- JHSC meeting minutes showing a review of pre-use inspections and findings

Preventive maintenance

Sample evidence submission:

Plan / Set a standard

- We chose this topic as there was a significant gap in the effectiveness of our previous Preventative Maintenance (PM) standard. Our last PM program was never properly implemented and did not include definitions, training requirements or evaluation.
- The first step was to review the existing PM policy and procedure and highlight the inefficiencies and gaps. We also developed an inventory list of all our company tools and equipment.
- The health and safety representative (HSR) created a new PM policy and made sure it met all the requirements outlined in the Health and Safety Excellence program (HSEp) topic guide. She also compiled the existing inspection standards and completed pre-use inspections (i.e. manufacture's instructions and legislative requirements) for all our company equipment and tools. This process took approximately one month to complete. Once the draft policy was completed, the HSR then developed a standard recording form to be used, which was approved by senior leaders on March 1 of this year.

Do / Communicate and train

- Our maintenance employee was trained on safe operating procedures on April 10, 2020, where the preventative maintenance program standard was discussed.
- The HSR and manager teamed up and developed a tool maintenance checklist. Employees need to inspect machines, complete a log, and identify any deficiencies in machines and tools before use. This is part of our health and safety compliance program, and, corrective action is taken if employees don't use the form.
- A copy of the PM policy is included in new hire orientation and annual health and safety refresher training. A copy is also included in our health and safety binder, and in our shop floor health and safety manual.
- The maintenance employee must complete training according to a training matrix, which outlines the inspection schedules, training schedules, and competency requirements to work on specific machines. They are required to sign off on training, and can't work until they complete training or have the necessary competencies.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Preventative Maintenance Policy and Procedure
- Completed inspection reports
- Maintenance schedule
- Training and competency requirement list
- Tools and equipment inventory

Control of documents

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Control of Documents Policy
- Copy of document master list
- Photos of storage folder and screen shots of digital program
- Training certificates
- Video interview with employees member

Control of records

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

- We conducted random interviews with employees between July and September. We found that they were all aware of our procedures for controlling records and managing documents.
- We evaluated this topic by completing an internal audit at our management meeting on November 18, 2020. We reviewed training to ensure all employees were trained, followed the protocols (i.e. completing the records request forms), and stored records properly.

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Control of Records Policy and Procedures
- Copy of training certificate: successful record keeping
- Completed records request form
- Photograph of our storage filing cabinet and lock
- Records master list

Contractor management program

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Visitors and contractor policies
- Contractor master list
- Copy of contractors' health and safety orientation video
- Purchase agreement of third-party supplier qualification platform

Workplace health promotion

Sample evidence submission

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Workplace Health Promotion Policy
- Employee engagement survey with results
- Copy of EAP contract, and promotional communication
- Video testimonial

Health and safety objectives

Sample evidence submission:

Plan / Set a standard

- We selected this topic to set clear annual health and safety objectives and goals, and to ensure that a procedure for writing out those goals and objectives was in place.
- Using the Occupational Health and Safety Act as a starting point and with support from our Health and Safety Excellence program (HSEp) provider, our Health and Safety Objectives policy and procedures was developed by the health and safety representative (HSR) and reviewed by senior management.
- When creating our policy and setting our objectives for this year, we set timelines for achievements based on health and safety goals for the company overall first, followed by objectives for specific areas like kitchen, dining and takeout.
- Part of the policy requires a review of each of the prior years' goals and objectives to determine the action plan for the following year.
- The policy and procedure was approved by the senior team on January 15, 2020.

Do / Communicate and train

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

Check / Evaluate

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

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

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

Corrective action

Sample evidence submission:

Plan / Set standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Health and Safety Corrective Action Policy and Procedure
- Sample completed Corrective and Preventative Action Forms
- Copies of completed health and safety infractions
- Training slide deck and attendance list
- Copies of email and communications

Level 3 – Advanced topics

Change management and procurement

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

- Interviews were conducted with supervisors and employees as part of our internal audit process. We reviewed all purchasing agreements and supply contracts to ensure compliance with the service level agreements' new health and safety requirements. In all cases of labour and supply contracts, our suppliers either met or exceeded our health and safety requirements. There was evidence of hazard and risk assessments, and pre-start training completed for all procured goods and services. Although they met expectations, some of our supply chain was missing agreement signatures on the health and safety requirements.

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Change Management Policy
- Service level agreements that outline health and safety requirements
- Pre-start training, risk assessment and hazard analyses
- Video interviews with supply chain

Monitoring, measurement and analysis

Sample evidence submission:

Plan / Set a standard

- We identified the *Health and Safety Trends* topic and the monitoring, measurement and analysis topic as two we wanted to develop this year. The topics work hand-in-hand to help identify opportunities for us to improve our health and safety program.
- The Health and Safety manager was assigned oversight of the collection and reporting of the data.
- We set a series of objectives to meet and outlined a policy and procedure, which were approved by senior management on March 1, 2020.

Do / Communicate and train

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

Check / Evaluate

- As a result of observations we found that we needed to ensure our air quality was sufficient.
- An air quality assessment was completed on March 2, 2020 to address the measurement of air quality.
- The health and safety team conducted a review from November 3-6, 2020. A statistical analysis by senior management, supervisors, and the Joint Health and Safety Committee (JHSC) members was also completed.
- We realized we needed to incorporate more employee feedback to ensure the data was relevant and helped to protect their well-being.

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Samples of health and safety indicators
- Video of health and safety personnel observing and talking to employees
- A copy of a toolbox talk form filled out by a supervisor
- Copies of evaluation of incident and injury reports

Review health and safety trends

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

- We developed an internal safety statistic tracking system, which allows senior leaders to monitor and support supervisors as they work, to ensure company health and safety targets are met.
- On May 15, 2020, a conference call was held with all supervisors, the senior management team and the Joint Health and Safety Committee (JHSC). We created an internal supervisor safety statistic tracking sheet and made it available to all employees on our shared server.
- Project managers and superintendents reviewed a summary related to hazards, inspections and other health and safety trends on a monthly basis through a standardized power point deck sent via email. The safety statistic tracking sheet was also updated monthly and available for review.
- Supervisors were trained on how to use a new software system to access information during a virtual team meeting and presentation on April 16, 2020.
- Once supervisors gained access, they began to receive automatic reminders for inspections and audits. The assigned managers and the health and safety department used these reminders to follow up on outstanding tasks or make decisions on areas that looked like they were at risk.

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- JHSC meeting minutes – showing a review of trends, and projects
- Health and safety action plan and yearly objectives
- Management review of Incident reports, near misses and health and safety trends
- Copy of internal safety statistic tracking sheets

Internal audit

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

- Following the audit, a debrief meeting was held with the management team on June 23, 2020. Further, an evaluation of the internal audit process and the audit results was completed by the Joint Health and Safety Committee (JHSC) and the senior leadership team on July 19, 2020.
- We identified twelve non-conformities on the audit, as well as an additional six opportunities for improvement. Non-conformities were prioritized by health and safety risk, and a continuous improvement plan (CIP) was created on August 10, 2020.
- The health and safety manager developed a consultation process to correct all identified non-conformities. Progress on the CIP was provided as an update during quarterly management health and safety meetings.

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Internal Audit Policy
- Internal auditor training records for all ten employees
- Completed internal audit report
- Completed continuous improvement plan

Management review

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Quarterly senior management meeting minutes – showing where reviews of the health and safety programs took place
- Internal audit report and continuous improvement plan
- Job duties description for new health and safety consultant
- Yearly summary of health and safety performance, created by our health and safety manager

Health and safety continual improvement planning

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Health and Safety Continuous Improvement Policy and the CIP template
- CIPs from three of our sites
- Timeline of activities, including responsibility chart, deadlines and key dates
- JHSC summary report presented to management group

External audit

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

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

Samples of evidence files to support the story:

- Video of audit in process
- Certification of third-party auditor qualifications
- Third-party audit report
- Continuous Improvement Plan (CIP), evaluation and approval
- Quarterly CIP progress reports

Networking and peer learning

Sample evidence submission:

Plan / Set a standard

- We promote peer networking across the organization and encourage employees to learn from information provided by industry experts and businesses dealing with similar issues.
- The overall goal for this topic was to create a policy and process for networking and peer learning opportunities related to health and safety.
- Senior management approved the policy on January 23, 2020.

Do / Communicate and train

- We researched networking and peer learning opportunities and wrote a report for senior management that outlined outlining learnings that could apply to our workplace.
- As per the approved policy, we have designated a specialist who regularly attends networking meetings. At these meetings they capture best practices and learnings that are used to inform our health and safety standards.

Check / Evaluate

- Our health and safety team evaluated the effectiveness of the new policy by monitoring attendance at networking meetings, and ensuring that information and learnings were shared and used to develop our health and safety program.

Act / Make improvements and/or acknowledge success

- One of the first examples of our success relates to our COVID-19 assessment questionnaire. By following the new procedure and attending a network meeting with businesses in our industry, we discovered that our COVID-19 assessment questionnaire was lacking.
- As a result the health and safety team developed a new COVID-19 questionnaire based on our local health unit's requirements.
- During performance reviews, many staff members gave their managers positive feedback on access to information for self-learning, and being given the opportunity to hear about what other businesses are doing from those who attend networking events.

Samples of evidence files to support the story:

- Networking and Peer Learning Policy
- List of events and conferences attended, with attendance lists
- Pictures of peer learning events
- Summary report, key findings from events

Corporate social responsibility

Sample evidence submission:

Plan / Set a standard

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

Do / Communicate and train

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

Check / Evaluate

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

Act / Acknowledge success and/or make improvements

- We shared a thank you letter with all employees using our social media page.
- We posted pictures of all our events and held a company-wide end-of-year event where we thanked all employees.
- We will include corporate social responsibility in future annual action plans to continue our philanthropic efforts.

- The management team celebrated these achievements with those that participated with gift cards and personal recognition cards.

Samples of evidence files to support the story:

- Corporate Social Responsibility Policy and statement
- Photo of our social responsibility statement in our lobby
- Photos from events
- Receipts from donations and tree-planting event