



PERforM – IMPLEMENTATION SUMMARY CHECKLIST

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Step	Questions and Prompts	Notes
1. Gain Management Commitment		
Management Commitment	<ul style="list-style-type: none"> • Introduce the program to management/leaders. • The success of PErforM is dependent on commitment from managers and supervisors. • <i>Refer to PErforM resource manual for workplace trainers – Appendix 11, 'PErForM Business Case Template', for a document that may assist in formalising endorsement from your management to implement PErforM in your workplace.</i> 	
2. Develop a plan for implementation		
Appoint a champion	<ul style="list-style-type: none"> • A person is required to facilitate the PErforM program. • A skilled and trained champion plays a critical role in promoting and driving the program. • <i>Refer to PErforM resource manual for workplace trainers – Appendix 3, Criteria for PErforM champions.</i> 	
Appoint a trainer	<ul style="list-style-type: none"> • Appoint a trainer(s) to deliver the PErforM for work teams training. This could involve training on-site staff or using an external provider. • Depending on the size of the organisation, the champion and trainer may be the same person. • <i>Refer to PErforM resource manual for workplace trainers – Appendix 3 Criteria for PErforM champions.</i> 	
Communication plan	<ul style="list-style-type: none"> • How will the program be communicated and promoted? <ul style="list-style-type: none"> – Newsletters – WHS Committee – Notice boards. 	
Implementing controls	<ul style="list-style-type: none"> • How can the program be embedded into existing WHS systems? • How will controls be approved, implemented and reviewed? • <i>Refer to PErforM resource manual for workplace trainers – Appendix 8, 'PErforM Ergonomic Controls Implementation', for an example of documentation that could be presented to management for decisions about controls implementation.</i> 	
Evaluation	<ul style="list-style-type: none"> • How will the program be evaluated? • What performance indicators can be used? i.e. discomfort surveys, number controls implemented, number risk assessments completed • <i>Refer to SafeWork Australia article on Performance Indicators.</i> 	

Step	Questions and Prompts	Notes
2. Develop a plan for implementation (continued)		
Pilot the program	<ul style="list-style-type: none"> Consider piloting the program before implementing it across the organisation. Focus on an area of the organisation that you would like to make change or improvements i.e. use injury/claims data, input from workers. 	
Identify work teams (facilitators) or a committee to undertake risk assessments and devise controls	<ul style="list-style-type: none"> The mix of people involved in the program may vary depending on the industry, tasks and work area being considered. It is essential to involve those doing the work as well as any other people impacted on by changes such as maintenance or cleaning staff. Other significant people include those with decision making capacity as well as engineering and innovative thinkers. 	
Identify hazardous manual tasks to be included in the training program	<ul style="list-style-type: none"> Determine appropriate hazardous manual tasks for teaching/learning risk assessment skills in the workshops. Have the work teams identify the hazardous manual tasks is part of the process. Have a few tasks already identified and videoed for the purposes of training. Obtain video footage of tasks flagged for use in the work team skills training session. <i>Refer to PErforM resource manual for workplace trainers – Appendix 6, ‘Handy tips for taking video footage’.</i> 	
Prepare training and workshop sessions	<ul style="list-style-type: none"> Prepare for training and workshop sessions including power point presentation, resources, handouts, location etc. <i>Refer to PErforM resource manual for workplace trainers – Appendix 1 PErforM for work teams workshop preparation guidelines.</i> 	
3. Identify hazardous manual tasks for priority risk assessment		
Conduct a survey	<ul style="list-style-type: none"> <i>Refer to PErforM resource manual for workplace trainers – Appendix 10, ‘Worker Discomfort Survey’, for a tool you could distribute for anonymous feedback to identify potential high risk tasks.</i> This also assists in prioritising work areas and tasks for attention. 	
Review incident and injury data	<ul style="list-style-type: none"> Undertake a review of your incident and injury data to assess if any trends or hazardous manual task issues. Identify ‘hot spots’ or issues. 	
Consult with workers through existing forums	<ul style="list-style-type: none"> Consult with Health and Safety Representatives, WHS Committees and Unions Reps to identify areas of concerns. Talk to workers undertaking jobs or tasks to understand what impacts them at work. 	

Step	Questions and Prompts	Notes
4. Train workplace trainers		
Conduct training	<ul style="list-style-type: none"> • Workplace champion and trainer(s) are trained in delivering the PErforM risk management method to work teams. 	
5. Train work teams		
The trainer assists work teams to assess their hazardous manual tasks and develop control ideas	<p>The risk assessment is done through:</p> <ul style="list-style-type: none"> - analysing video footage/observation of the chosen high risk manual task(s) or an on-the-job task - group discussion - Using the PErforM risk assessment tool to identify controls. <ul style="list-style-type: none"> • Work teams that have been identified in the implementation plan are trained in the PErforM risk assessment method by the nominated workplace trainer(s). • <i>The teams training workshop should include some practice at performing a risk assessment on a problem workplace manual task using the PErforM risk assessment tool (refer to PErforM resource manual for workplace trainers – Appendix 2). Workplace video or an on-the job review of a job or task is particularly useful for this skills activity.</i> 	
6. Conduct Risk Assessments and Propose Controls		
Prioritise risk assessments	<ul style="list-style-type: none"> • Outline a plan for the completion of risk assessments i.e. what to start with. • Pick your top worst 5 to 10 hazardous manual tasks and start there. • Prioritise using survey results, incident and injury data and worker feedback. • Review this list on a regular basis. 	
Conduct risk assessments	<ul style="list-style-type: none"> • Undertake risk assessments on-the-job. • Risk assessment to be led by worker trained as a PErforM facilitator. • Risk assessments to have photos and videos of tasks to be captured to assist in risk assessment process. 	

Step	Questions and Prompts	Notes
6. Conduct Risk Assessments and Propose Controls (continued)		
Propose controls	<ul style="list-style-type: none"> Proposed controls to be identified for the each assessment. All controls to be captured and recorded for possible implementation. Start with higher level controls i.e. focus on elimination, substitution, isolation and design controls. Don't rely on or revert to just low level controls i.e. Administrative controls. <i>Refer to PErforM resource manual for workplace trainers – Appendix 8, 'PErforM Ergonomic Controls Implementation', for an example of documentation that could be presented to management for decisions about controls implementation.</i> 	
7. Implement controls		
Review and approve proposed controls	<ul style="list-style-type: none"> Management considers the risk assessments and the proposed controls. Approved controls should be implemented and reviewed. <i>Refer to the WHSQ website for an injury cost calculator to assist in developing a business case for controls.</i> 	
Trial controls	<ul style="list-style-type: none"> Trial controls to ensure effective and suitable before fully implementing. 	
Review controls	<ul style="list-style-type: none"> The work teams should be involved in monitoring, reviewing and reassessing tasks to ensure controls are effective. Use a control review assessment to assess the effectiveness of controls. Consider establishing a review committee to coordinate the implementation and evaluation of the control ideas. The committee suggested composition: <ul style="list-style-type: none"> – safety staff – the site engineer/maintenance rep – a worker and management representative. The committees worked with everyone involved to take ownership of the PErforM process to make it a permanent part of the workplace systems. 	

Step	Questions and Prompts	Notes
8. Evaluate the PERforM program		
Establish performance indicators	<ul style="list-style-type: none"> Monitoring the effectiveness of the program can be done using a combination of positive and negative performance indicators to identify and measure key performance indicators. 	
Evaluate positive performance indicators	<p>For example consider:</p> <ul style="list-style-type: none"> Number of risk assessments completed Number of controls implemented Time to implement controls Level of controls implemented Less discomfort and issues reported by workers. 	
Evaluate negative performance indicators (lag)	<p>For example consider:</p> <ul style="list-style-type: none"> Number of incidents or injuries Severity of injuries Costs of injuries. 	

This information has been sourced from the Participative Ergonomics for Manual Tasks (PERforM) Handbook Worksafe QLD. For more information please visit www.safework.nsw.gov.au

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