



WORK BOOK

**Managing Personal
Safety at Work**



Managing Personal Safety at Work

How to use this workbook

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How to use this workbook

Please use this workbook to write down your answers for the tasks in the Managing Personal Safety at Work e-learning course.

The supporting documents referred to in this workbook can be found in a section at the end of the book. There are also a range of links to other resources that may be helpful throughout the workbook.

You can use this workbook when you have a discussion with your line manager after completing the training. There is a form at the end of the workbook to record key points from this discussion should you require it.

Lesson 1 - Why consider Personal Safety at work?

Learning outcomes:

By the end of this lesson, you should be able to:

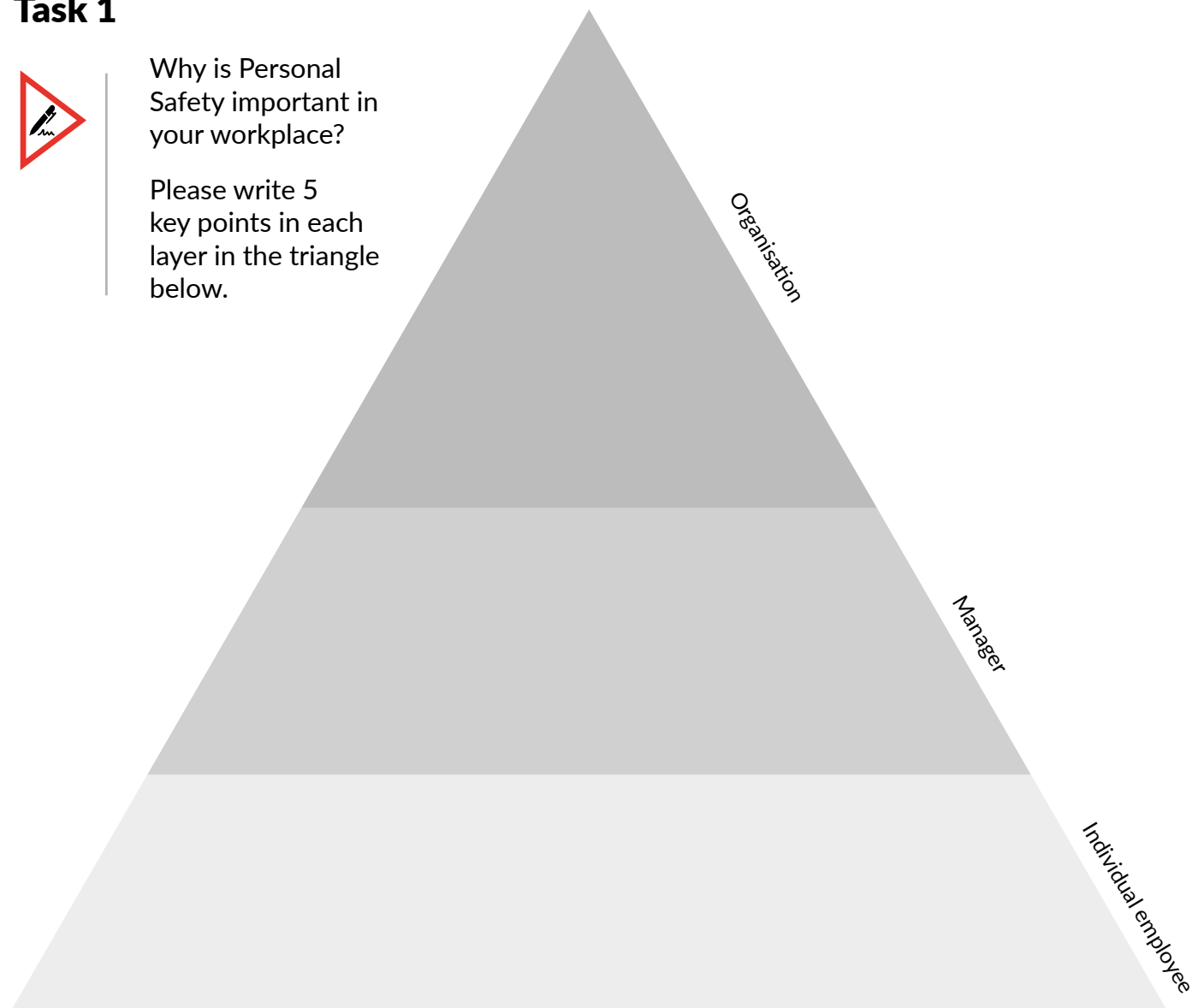
1. Identify the main reasons Personal Safety is important within your organisation
2. Describe your key responsibilities regarding the management of Personal Safety
3. Understand the importance of incident reporting and analysis
4. Be able to apply a simple model for the management of Personal Safety relevant to your role

Task 1



Why is Personal Safety important in your workplace?

Please write 5 key points in each layer in the triangle below.



Task 2



Write down 5 responsibilities for the employer and 5 responsibilities for the employee regarding Personal Safety.

Employer	Employee

Task 3



Put on a timer for three minutes. Write down as many responsibilities as a manager regarding Personal Safety that you can think of.

Task 4



Consider the 6-stage model on the management of Personal Safety at work. Read the summary PDF in the supporting documents for more ideas on application of the model. Think about one aspect of Personal Safety at work such as reporting incidents or risk assessment. How can you apply this model in your workplace? Write down a few key points.

Task 5



Listen to the interview with your Health and Safety Manager where s/he discusses the process of reporting an incident. You may make any notes in the box below.

Lesson 2 - Assessing the risks

Learning outcomes:

By the end of this lesson, you should be able to:

1. Understand the elements of formal and dynamic risk assessment
2. Carry out a risk assessment on a role within your organisation
3. Apply a simple model to carry out dynamic risk assessment
4. Be aware of the need for 'warning markers'

Task 1



Answer the questions below about how you manage risk assessment by putting a tick in the appropriate box.

	Yes	No	Not sure
Is there a risk assessment for every role that you manage?	☐	☐	☐
Do you risk assess all the separate tasks carried out in a person's role?	☐	☐	☐
Do you revisit the risk assessment regularly?	☐	☐	☐
Do you revisit the risk assessment if an individual's circumstances change – pregnant, new role, health issue?	☐	☐	☐
Are your risk assessments documented?	☐	☐	☐
Are the risk assessments accessible by managers and staff?	☐	☐	☐
Do you encourage dynamic risk assessment?	☐	☐	☐
Are your staff trained in dynamic risk assessment?	☐	☐	☐

If you have answered 'NO' to anything above think about what you can change or put in place.
 Can you review your onboarding or induction practices? Can you raise issues in annual reviews?
 Can you introduce some new training or send out emails with scenarios?

Task 2



Document a formal risk assessment for a person you manage. Here's an example template below you may like to use or use one from your organisation if you prefer.

Risks	Task	Control	By whom/when
Who?			
What?			
Where?			

Discuss your completed risk assessment with your line manager or a colleague.

For more details about carrying out risk assessments and some examples follow this link to the Health and Safety Executive's website: **HSE Risk Assessment**

Task 3



Watch the video where Chloe describes an incident that happened to her.

What can you do as a manager to ensure that staff such as Chloe minimise the risks to their Personal Safety as they go about their work? Write down at least five strategies in the box below. Do you have strategies such as these in place?

Think about WWW - Who? What? Where? - Identify the risks that the staff member faces in their day and record them in the box provided.

Task 4



Following an incident like this Chloe would need to report this incident. This should trigger a warning marker. As a manager you should know how warning markers are triggered and ensure they are kept up to date.

What is the process for ensuring a warning marker is raised in your organisation, and how are these kept up to date and relevant? Are there any gaps?

Process to raise, implement and update a warning marker	What needs to change?	Who can help?

Lesson 3 - Developing a toolkit for avoiding, reducing and managing risk

Learning outcomes:

By the end of this lesson, you should be able to:

1. Apply different Personal Safety models to avoid, reduce and manage the risks to staff
2. Ensure physical work environments are safe
3. Identify and implement safe systems of work for home visits
4. Understand the importance of using emergency drills to prepare staff for different situations

Task 1



Watch the video – Afternoon Rush.

Use the Choices Triangle and PLAN models to review how you could ensure staff carrying out home visits stay safe. Remember to think about **AVOID REDUCE MANAGE**. Write down at least 10 procedures for staying safe during a home visit.

You will find the Choices Triangle in the supporting documents at the end of the workbook.

Do you need to revise your current procedures? What are the gaps?

Who will you need to involve to revise these procedures?

You can refer to the supporting document 'Home visits - good practice' to get some ideas.

Task 2



The environment plays a key part in how safe you feel or actually are. Think about a working space you are responsible for or where staff you manage work. This could be for example a reception area, a customer's home, an interview room, a scheme manager's office, a satellite hub.

Identify how the physical environment may impact on staff's Personal Safety. What can you do to make this environment safer? What is missing or could be improved? How can you ensure this happens? If the environment can't be changed what procedures can make working there safer?

You can look at the supporting document 'Example risk assessment of the physical environment'

Location		
Issue with building and/or location	Possible solution	Who can help?

Task 3



Watch the following short video about a customer in a reception area. At the point the video stops write down two scenarios of what might happen next e.g. reveals a weapon, threats to self-harm. Write down the emergency procedures you would need in place for these scenarios.

Scenario 1

Emergency procedures

Scenario 2

Emergency procedures

Task 4

What if? Scenario planning



Analyse recent emergency incidents in your own or similar settings to your workplace.

Write two short scenarios that may happen at work in different settings for staff you manage.

Scenario 1

Scenario 2

Discuss these scenarios in your next team meeting. Let staff talk about how they would act. You can make 'What if' scenarios a regular staff meeting item by asking different members of staff to suggest different scenarios. Staff could discuss what they would do and any changes in safe working practices that need to be made.

There is a list of eight different scenarios in the supporting documents at the end of the workbook that you may find useful.

Collate any ideas into an emergency checklist (blank template below).

Emergency checklist
Location: e.g. reception

You can look at some ideas for planning for emergencies here on the HSE website.

hse.gov.uk/toolbox/managing/emergency.htm

Lesson 4 - Developing robust and effective tracing systems

Learning outcomes:

By the end of this lesson, you should be able to:

1. Understand the key elements of a robust tracing system
2. Use and manage designated PPE effectively as part of a robust tracing system
3. Create buy-in from your staff to commit to using a robust tracing system consistently
4. Implement, monitor and evaluate an effective tracing system

Task 1



A tracing system aims to ensure that if something unexpected happens you can quickly get the help you may need. How effective is your tracing system for the staff you are managing and responsible for? Tick the appropriate boxes below.

	Yes	No	Not sure
If a member of my staff did not return to the office/base on time I would be alerted and know exactly where they were last working	☐	☐	☐
If staff change their plans during the day they would always update their calendar or let me know	☐	☐	☐
Staff are equipped with a lone worker device (LWD) where appropriate and they know how and when to use it	☐	☐	☐
I monitor the use of the LWD for all staff and raise lack of use in supervision sessions	☐	☐	☐
We have got an effective system for staff to raise an alarm discreetly in case of emergency and they all always use it	☐	☐	☐
If a member of staff uses their SOS to raise an alarm there is a robust procedure that I can follow	☐	☐	☐
We have got a very clear procedure to follow if someone does not come back on time or fails to return home	☐	☐	☐
I have access to next of kin contact information and it is up to date for all staff I manage	☐	☐	☐
My staff and their families have the contact details of myself or a colleague in case they do not return on time from work	☐	☐	☐

Looking at the answers from the previous page revisit your tracing system. The more times you have answered No, the more gaps there are in your system. Make sure your tracing system is robust and that if something did happen to members of staff you manage, they would receive the help they need as quickly as possible.

Make a note of these changes below. Think about how you will ensure your team complies with new procedures.

Task 2



Watch the video with Amina. How can she use her PPE appropriately in this situation before, during and after the visit?

Do staff have a checklist of how to use their lone working device (LWD) correctly? Are there any gaps? If so, make a checklist of how you want your staff to use their LWD. Have staff received training in the correct use of the LWD? Think about how you will monitor this.

There is a summary of how to use a LWD correctly in the supporting documents.

Task 3



Return to the video with Amina.

Did you pick up everything that Amina does? What changes do you need to make to ensure that this is happening in your team every visit? How can you embed the good practice?

Task 4



One issue managers face is staff who fail to buy into the rationale for using a tracing system. Occasionally staff use a wide range of excuses why they don't use their lone working device.

Make a list of at least 10 different ways to get staff to commit to using a tracing system. For example, you could use 'What If' scenarios in a team meeting to raise awareness. It can be useful to think of this as methods that are part of your more formal staff management and those methods that are more informal but help to create a culture of conformity.

Formal	Informal
Ensure that staff receive training in the tracing system as part of their induction before they start work	Use 'What If' scenario for someone being held hostage during a home visit during a team meeting

Lesson 5 - Supporting your staff

Learning outcomes:

By the end of this lesson, you should be able to:

1. Debrief with confidence
2. Understand the broad impact of a Personal Safety incident at work
3. Know how to support staff effectively following an incident
4. Encourage staff to reduce and manage their stress

Task 1



Watch this interview of Emma who has experienced an incident at work.

Consider that you are the manager responsible for debriefing Emma and others following this incident. How would you approach this so that Emma felt better supported? What support can you signpost Emma to?

You can refer to the supporting document 'Responding and support following an incident'.

Complete the table below.

Have a look at this summary from the HSE for some ideas of how to manage an incident and debrief victims and their colleagues.

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Task 3



Think about the staff you manage.

- ▶ In the 'stress bucket' below write down anything that can indicate that staff you manage or work with are under stress
- ▶ Underline anything that you can monitor such as sickness levels

Stress Bucket



Task 4



How can you help staff to manage their stress both in and out of work? Write at least 5 different ideas. You may want to think about actions for the individual and actions for your team.

e.g. Encourage all staff to take their allocated lunch break – to eat and relax

Lesson 6 - Creating a culture of Personal Safety with your staff

Learning outcomes:

By the end of this lesson, you should be able to:

1. Keep a focus on Personal Safety
2. Involve staff proactively in managing their own Personal Safety
3. Apply practical strategies to create a positive culture around Personal Safety
4. Understand the importance of effective communication

Task 1



Watch the interview with an experienced manager of lone workers.

Make a note of all the different ways she contributes to creating a culture of Personal Safety within her team and the wider organisation.

Task 2



Think about your own organisation and what you do as a manager.
Write down what you have in place that helps to create a positive
Personal Safety culture.

What needs to be improved and what you could introduce?

We have this and it is embedded	This could be improved	We could introduce this

Task 3



Write down at least ten different ways you can communicate as a manager about Personal Safety at work to create a positive culture and ensure staff are proactive in managing their own Personal Safety.

e.g. Use 'What If' scenarios in team meetings

Summary of the course

Well done! You have now completed all six lessons. Hopefully you have learned some new things as well as refreshing your knowledge. You can check out the answers to some of the tasks in the supporting documents that follow.

Final Task



Once you have finished, look through your workbook and reflect back on what you have covered. Put a star by any key actions you are going to take over the next two weeks.

You can also use this workbook in a discussion with your line manager. There is a form at the end for you to record this discussion.

Why is Personal Safety Important?

To the organisation

Legally

- ▶ The Health and Safety at Work Act (HSWA) 1974 places a legal duty on employers to ensure, so far as reasonably practicable, the health, safety, and welfare of employees, and to ensure that employees and others are kept safe. Under the Act you have an obligation to ensure any potential risk of work-related violence is eliminated or controlled
- ▶ The Management of Health and Safety at Work Regulations (MHSWR) 1999 require employers to consider the health and safety risks to employees and to carry out a risk assessment to protect employees from exposure to reasonably foreseeable risks. Those risks include work-related violence

Financially

- ▶ Failing to proactively manage Personal Safety risk can be very expensive for an organisation. Staff who experience violence and aggression at work without adequate procedures and support can experience a drop in their performance, increased sickness and may be more likely to leave the organisation
- ▶ In addition, the organisation will be at risk from possible litigation, compensation claims, fines and higher recruitment costs
- ▶ A poor reputation for the management of personal safety may impact on the organisations' ability to obtain and retain contracts and investment

Morally

- ▶ When the approach to the management of personal safety is comprehensive, your employees will feel valued, safe and comfortable in their roles. A better working environment leads to employees who feel confident, supported, and valued, leading to growth, both individually and as an organisation
- ▶ Failure to manage personal safety adequately can reduce the organisation's ability to attract and retain talent; it can adversely affect the relationship with customers
- ▶ The public's overall impression of the organisation may be damaged; this reputational damage can have a negative impact on the productivity and performance of an organisation

To the manager

- ▶ Affects performance and team morale
- ▶ Increased stress levels of team members and manager
- ▶ Increased staff absence to manage
- ▶ Increased staff turnover leading to poorer service
- ▶ An increase in complaints or incidents to deal with
- ▶ The manager has a legal responsibility for the personal safety of his/her staff

To the individual

- ▶ Wants to avoid a negative impact on their physical or mental health and their emotional wellbeing
- ▶ Wants to avoid being injured or killed
- ▶ Wants to return to their loved ones at the end of the working day in the same healthy condition that they started work
- ▶ Wants to avoid the wider impact of an incident of violence and aggression on their family or friends

The Legal Argument

1 Health & Safety at Work Act 1974

The basis of British health and safety law is the Health and Safety at Work Act, 1974. Employers have a duty of care to ensure, as far as is reasonably practicable, the health, safety and welfare at work of their employees.

Under Section 2 of this Act, employers have a duty, where violent incidents are reasonably foreseeable, to identify the nature and extent of the risk and to devise measures which provide a safe workplace and system of work.

This section 2 duty extends in particular to the provision of information, instruction, training and supervision. This has to be ...'sufficient to enable workers to complete their work in safety'.

The words 'reasonably practicable' are critical. Risk needs to be balanced against resources. This balancing of risk versus resources implies the need for a formal documented risk assessment to be carried out and evidenced, so that it can be clearly demonstrated that the risk was explored and that adequate control measures were put in place.

2 Management of Health & Safety at Work Regulations 1999

Employers are obliged to proactively control risk. The organisation must assess 'reasonably foreseeable' risks, create safe systems of work, communicate these to their employees and review their systems on a regular basis.

3 The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR)

Employers must notify their enforcing authority in the event of an accident at work to any employee resulting in death, specified injury, or incapacity for normal work for seven or more days. This includes any act of nonconsensual physical violence done to a person at work.

4 Corporate Manslaughter and Corporate Homicide Act 2007

This act is a landmark in law. For the first time, organisations can be found guilty of corporate manslaughter as a result of serious management failures resulting in a gross breach of a duty of care. The Sentencing Guidelines Council has suggested that the appropriate level of fine for corporate manslaughter will seldom be less than £500,000 and may be measured in millions. For health and safety offences that have led to a death, the appropriate fine will rarely be less than £100,000, and may be measured in hundreds of thousands of pounds or more.

5 Health and Safety Offences Act 2008

The 2008 Act amends Section 33 of the Health and Safety at Work Act 1974 (HSWA) and raises the maximum penalties available to the courts in respect of certain health and safety offences. It also makes imprisonment an option for more offences, and makes certain offences that are only triable in lower courts, triable in either the lower or the higher courts.

Section 37 of the HSWA allows action to be taken against individual directors, managers and officers where a failure can be attributed to their neglect, consent or connivance.

The 2008 Act raises the maximum summary (lower court) fine to £20,000 and introduces a term of 12 months imprisonment on summary trial, whilst a term of two years imprisonment and/or an unlimited fine will be available on indictment (higher court).

6 Article 2, Human Rights Act 1998

Article 2 states that 'Everyone's right to life shall be protected by law.' This is a trump card over and above the ample provision of the Health and Safety at Work Act 1974 and its associated regulations. Where there is the argument that there are statutory obligations to provide services to vulnerable people in our society, we have to remember that these obligations are themselves subject to the rules about safety at work and the protection of human life. No manager should be thinking about the importance of providing their service and prioritising key performance indicators in favour of their obligations to ensure that all of their staff go home safely to their families after their shifts.

How safe are your staff? A checklist for managers

The following checklist has been devised to help managers ensure that they have carried out everything that is reasonably practicable to ensure the Personal Safety of their staff and to minimise the risk from violence and aggression.

Personal Safety is defined as:

'An individual's ability to go about their everyday life free from the threat or fear of psychological, emotional or physical harm from others'. Suzy Lamplugh Trust

Violence and aggression is defined as:

'Any incident in which a person is abused, threatened or assaulted in circumstances relating to their work.' Health and Safety Executive (HSE).

Policies

Please tick

- | | |
|--|--------------------------|
| ▶ Are the Personal Safety and/or Lone Working policies fit for purpose? | ☐ |
| ▶ Have all your team read and understood these policies? | ☐ |
| ▶ Are these policies embedded and fully adhered to? | ☐ |
| ▶ Do staff receive regular information and updates on policies and procedures around lone working and personal safety? Have your team members been involved in consultation for the formation or review of any policies or procedures? | ☐ |
| ▶ Is there a recognised group or forum within the organisation that considers Personal Safety issues and incidents of violence and aggression? | ☐ |
| ▶ Is there a culture of 'zero tolerance' of violence and aggression that is supported throughout the entire organisation? | ☐ |

Risk Assessment

Please tick

- ▶ Have you considered all the risks to personal safety that different staff face in your risk assessments? ☐
- ▶ Does your risk assessment fully reflect the risk of violence and aggression in your particular workplace? ☐
- ▶ Are staff fully involved in the risk assessment process? ☐
- ▶ Are risk assessments carried out for specific activities such as home visits, lone working, out of hours work? ☐
- ▶ Do risk assessments take account of personal staff attributes and changes in health or circumstances? ☐
- ▶ Are risk assessments regularly reviewed and updated? Are risk assessments easily available for staff to use, review and update? ☐
- ▶ Are staff aware that they are responsible for carrying out dynamic risk assessment? ☐
- ▶ Do you encourage and support a 'walk away' mindset in your team if staff feel uncomfortable? ☐

Safe working practices

- ▶ Have all your team members been issued with the relevant and correct personal protective equipment (PPE)? Is it in good working order? ☐
- ▶ Have the staff been trained properly how to use their PPE? Have you checked with them? ☐
- ▶ Do you carry out emergency drills? ☐
- ▶ Do you permit two members of staff to attend a home visit if they request this, regardless of whether there is a personal safety alert on the system? ☐
- ▶ Are procedures in place for all the risks identified such as late-night and weekend working procedures, meetings with clients, home visits and lone working? ☐
- ▶ Are your procedures regularly reviewed and updated based on monitoring and feedback? ☐

Tracing systems

- ▶ Do you have a robust tracing system in place? ☐
- ▶ Do you always know the whereabouts of all your team? ☐
- ▶ Do you have a robust buddy system? ☐
- ▶ Do you have an appropriate 'safe and well' check-in at the end of the working day? ☐
- ▶ Do your staff use lone worker devices? ☐
- ▶ Do you encourage the correct use of the lone worker device and monitor its use (if applicable)? ☐
- ▶ Are your team's next of kin's contact details up to date and readily available, should something happen to a member of staff whilst at work? ☐
- ▶ Have you included car details? ☐
- ▶ Do you check next of kin details annually and during induction? ☐
- ▶ Are your team members' calendars always up to date and open to everyone? ☐
- ▶ Have you ensured that the tracing system properly covers agile workers, temporary or agency staff and those based from home? ☐
- ▶ Have you got a clear plan in case a member of staff fails to return? Have you practised this? ☐

Environment and premises

- ▶ Have you conducted Personal Safety audits of the buildings where your team work or visit? ☐
- ▶ Are there any weak spots such as poor lighting, insecure doors, lack of CCTV cameras, lack of panic button, location of staff car park? ☐
- ▶ Have you followed these concerns up with senior management? ☐
- ▶ Can your workplace access be monitored and controlled to allow for the screening of visitors? ☐
- ▶ Do you have procedures in place to ensure the safe-keeping of staff members' valuables, ensuring that personal possessions are kept to a minimum? ☐
- ▶ Do you have procedures in place for emergency evacuation or lockdown of premises? ☐
- ▶ Do you regularly practise this? ☐

Incident reporting and management

- ▶ Is there a clear procedure for the reporting of incidents of violence, aggression, and unacceptable behaviour, that includes near-miss reporting? ☐
- ▶ Do you proactively promote incident reporting? ☐
- ▶ Are you confident that sufficient reporting, that accurately reflects the level of violence and aggression, is taking place? ☐
- ▶ Do you personally follow up on the incidents with the Health & Safety team? ☐
- ▶ Are your team members aware of when and how to escalate an issue? ☐
- ▶ Are procedures in place for when an incident occurs? These should include immediate response, reporting, monitoring, support, de-briefing and further actions, where applicable. ☐
- ▶ Are these procedures regularly reviewed and amended if appropriate? ☐

- ▶ Are there accurate records of incidents which are well managed and up to date?
- ▶ Are managers supplied with regular reports on incidents, trends and patterns?
- ▶ Are support structures such as employee assistance programmes or mentoring in place for staff if incidents occur?

☐
☐
☐

Training

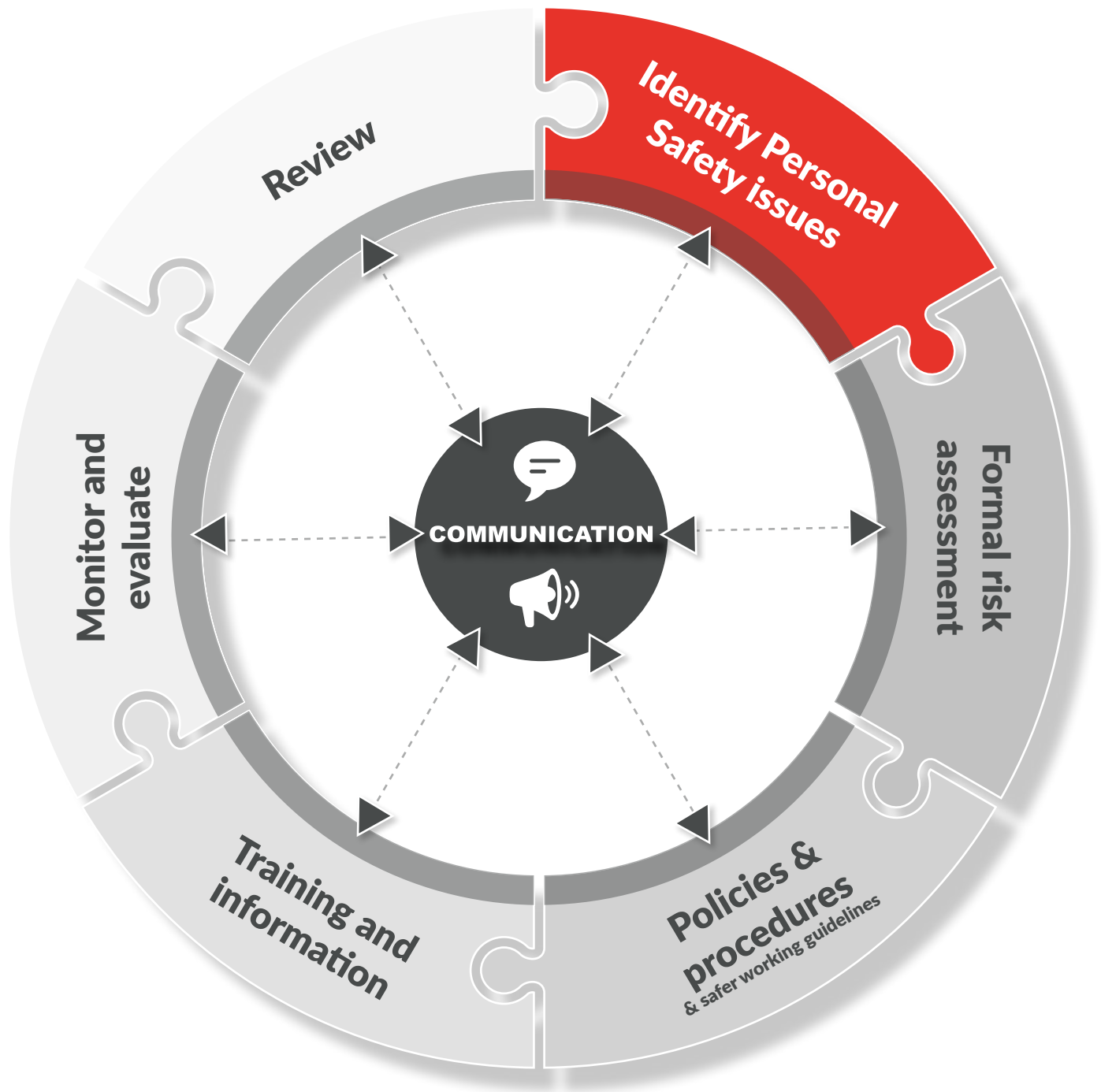
- ▶ Do managers receive training in risk assessment and the management of Personal Safety at work?
- ▶ Do managers receive information and training on the management of incidents?
- ▶ Do staff receive regular training on policies and procedures around lone working and Personal Safety?
- ▶ Do staff receive refresher training in Personal Safety?
- ▶ Do new members of staff receive Personal Safety training during induction?
- ▶ Do staff receive training on carrying out dynamic risk assessment?
- ▶ Do staff receive training on recognising the early warning signs for potentially violent and aggressive behaviour?
- ▶ Do staff receive training on how to respond to threats and violent and aggressive behaviour?
- ▶ Are staff given sufficient time to attend training and read policies etc?
- ▶ Is training delivered in an appropriate and relevant way e.g. face to face, virtual live via Zoom/Teams, e-learning, webinars, toolbox talks?

☐
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Culture of Personal Safety

- ▶ Do you cover Personal Safety during team meetings and supervision? Is it a standing agenda item? ☐
- ▶ Are staff given the opportunity to share experiences openly and without blame? ☐
- ▶ Do your team members feel empowered to raise concerns and share knowledge? ☐
- ▶ Do you encourage a deeper dive into Personal Safety issues during team meetings? ☐
- ▶ Have you discussed with your team the risks of using social media? ☐
- ▶ Do you role model the behaviour expected in the policy? ☐
- ▶ Do you listen to staff concerns around Personal Safety? ☐
- ▶ Do you respond to feedback? ☐
- ▶ Do you have regular contact with each member of your team? ☐
- ▶ Do you feel responsible for the welfare of your team? ☐

Six stage model for managing Personal Safety



A Six Stage Model for Managing Personal Safety in Practice

Phase	Individual	Team	Organisation
Communication is overarching	Management of Health and Safety at Work Regulations 1999 (consultation). Regulations 1996 (b), Safety representatives & safety committees' regulations 1997	To recognise that communication is an essential element of this model. Information should be readily available with all stakeholders involved	▶ Consult with all staff and ensure feedback is given ▶ Ensure adequate open exchange of information ▶ Line management, H&S and union representatives can be used to disseminate information and encourage participation ▶ Frontline staff often have a different perspective to managers of the issues they face ▶ employee consultation can be Individual and as a group if possible
1. Identify personal safety issues	Management of Health and Safety at Work Regulations 1999 (consultation)	To identify the concerns of staff and management and gather feedback on the effectiveness of existing structures	▶ Focus groups ▶ Questionnaires ▶ Incident report forms ▶ Audits and analysis of current systems ▶ Input of external organisations e.g., unions, the HSE and similar organisations ▶ Management may have different view to frontline staff so just asking staff about the issues they face can be effective
2. Carry out formal risk assessments	Management of Health and Safety at Work Regulations 1999	To identify and prioritise the risks staff face. Evaluate the effectiveness of existing control measures and identify the need for new measures	▶ Principles of 'reasonably foreseeable significant risks' ▶ Balance risk vs. cost (reasonable practicability) ▶ Documentation is vital ▶ Competent person principle ▶ Employees have responsibility to inform of any shortfalls in safe working procedures or new risks

Phase	Individual	Team	Organisation
3. Ensure effective policies, procedures & safer working guidelines	Health and Safety at Work Act 1974 Management of Health and Safety at Work Regulations 1999	To produce written documentation outlining and showing implementation of how the organisation plans to eliminate, reduce or control risk, as a result of the risk assessment.	▶ Define violence and aggression and the organisation's view/commitment to the issue ▶ Proactive measures, after incident support ▶ How should staff report incidents and near misses? ▶ Make it simple, systematic, clear, concise ▶ Be aware of GDPR when using violent warning markers or similar ▶ Dual responsibility of employer to develop and employees to follow and implement any safe working procedures
4. Training & information	Health and Safety at Work Act 1974. Management of Health and Safety Regulations 1999	Communicate policies, procedures and guidelines to staff. Equip staff with the skills needed to manage residual risk.	▶ Provide interactive, relevant, involved training ▶ Provide and inform on what resources are available on the subject ▶ Evaluate the training in terms of effectiveness - short and long term ▶ Keep on the agenda at regular staff and management meetings ▶ Integrate Personal Safety into the organisation's culture
5. Monitor & evaluate	Management of Health and Safety Regulations 1999.	To ensure procedures and guidelines are working as intended and revise when needed	▶ This is an ongoing process ▶ Need to ensure that control measures are working ▶ Ensure that line managers are supporting staff ▶ Use feedback from staff e.g. reports and focus groups
6. Respond, support and review	Management of Health and Safety Regulations 1999. The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR 2013)	If an incident occurs or working practices change, you need to respond and support staff	▶ Post incident risk assessments ▶ Annual review of process and controls ▶ Assess new risk brought by new tasks or changes in tasks ▶ Review each step and ensure everything is documented ▶ Support those staff affected by an incident

Incident reporting

An effective incident reporting system is crucial for the prevention of violence and aggression in the workplace. The organisation must create a clear and user-friendly system so that it can be completed properly and promptly either by or on behalf of the victim. Clear guidance needs to be given to staff on the types of incident to report and what action to expect from management as a result.

Some organisations use existing accident reporting systems to record incidents of violence and aggression. This may lead to an unrealistic picture as often staff only report incidents involving physical injury. A separate system using a specific form to record incidents of violence, aggression and other unacceptable behaviours and near misses is therefore highly recommended.

Employees have a responsibility to report such incidents of violence, aggression and other unacceptable behaviours. As a manager, you have a key role in the whole management process of incident reporting and feedback.

The aims of a reporting system are to:

- ▶ Provide a full and clear picture of what is really happening in a geographical area or with a particular customer
- ▶ Enable staff to share information and intelligence
- ▶ Inform senior leadership
- ▶ Provide a record for legal, insurance and trend analysis purposes
- ▶ Alert managers to actual and potential physical and psychological harm
- ▶ Help identify staff at risk in particular locations or doing particular tasks
- ▶ Provide an input into staff training and awareness raising
- ▶ Monitor existing control measures
- ▶ Provide valuable information to feed into the organisation's risk assessment process

The benefits of an effective reporting system are:

- ▶ Monitoring potential causes of concern can help pre-empt problems and provide vital information for all
- ▶ The information can be used to feed into the alert/warning marker system
- ▶ Identifying trends and patterns can highlight a need for reviews and possible changes to procedures
- ▶ The information may highlight a need for additional staff training
- ▶ Senior leadership and the board may provide additional support and resources
- ▶ A comprehensive history of evidence may be needed for any kind of action against a customer
- ▶ Consistent and comprehensive reporting sets a tone and a culture that unacceptable behaviour will not be tolerated. This should be reflected in any customer agreement or licence.

- ▶ Having a consistent approach to reporting helps to keep you and your colleagues safer, and it empowers people to walk away sooner rather than later.
- ▶ Information that may need to be collected on the incident report includes:
 - Time, day and date. This may help identify peak periods or patterns of risk
 - A description of the location. This can highlight design problems that can be put right or indicate areas of high risk
 - An account of what happened leading up to and during the incident. This may highlight the need for changes in working practices, training, physical security etc
 - A description of the perpetrator if known
 - An attempt to identify the causes and motives (without attributing blame). This could help highlight where systems and procedures trigger violent behaviour e.g. when people have been kept waiting

Action required from management following the reporting of an incident

- ▶ The report of an incident should trigger further action and support
- ▶ Feedback is vital to keep staff informed. This will reinforce the importance of reporting, ensure staff feel that the issue is being taken seriously and encourage future reporting
- ▶ The incident report form needs to remain confidential as some staff may not report incidents unless they feel sure that their privacy is protected

Near miss recording

There can be drawbacks to using a formal system to record all incidents of violence and aggression, depending on the role and customers. Some staff may feel that they do not have time to complete an incident report form for the numerous minor incidents they experience. In such circumstances it may be useful to set up a near miss reporting system, although this needs to be checked with your own organisation. Such a system is best developed at a very local level and may contain one line about the incident. When such a system is implemented it is important that:

- ▶ Staff are aware of the criteria for filling in a near miss report rather than completing a violent incident report, so that consistent information is collected
- ▶ The information on the near miss forms is monitored closely, to allow early intervention where appropriate
- ▶ The information is analysed and used to help prevent more serious incidents and inform future risk assessments

Manager's checklist

You should make clear to all your staff:

- ▶ What they are required to report (incidents, near misses, causes for concern)
- ▶ Who has the overall responsibility for the reporting system
- ▶ How to report an incident (what do the forms look like, where are they kept, are they online etc.)
- ▶ How to complete an incident form accurately and where to get help completing the form
- ▶ Where to send the completed form and what happens to it afterwards
- ▶ Where to go for advice, help, support and other aftercare services
- ▶ What procedures are in place to let them know any follow up action

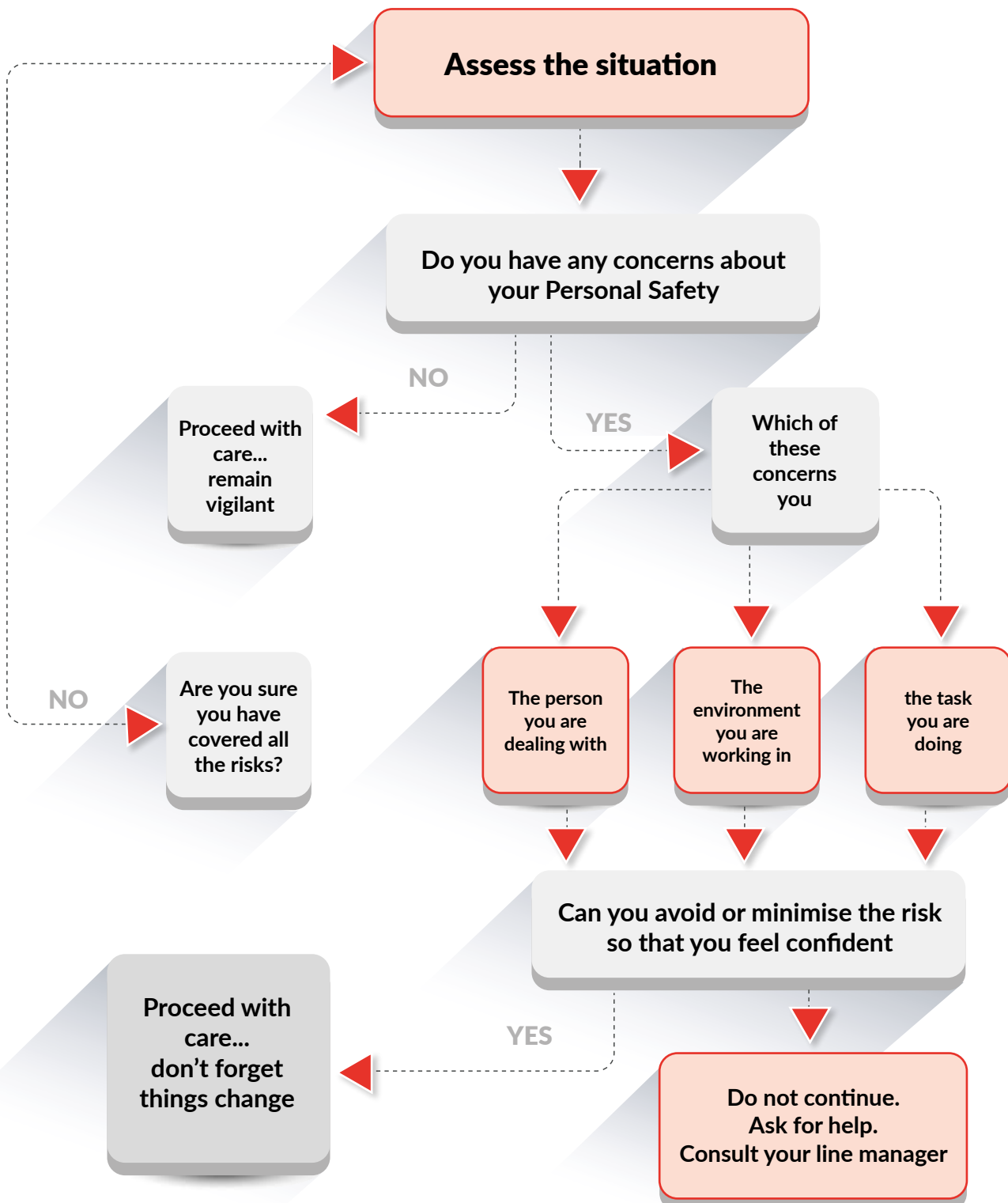
Questions for you as manager

- ▶ How well does your reporting system work right now?
- ▶ Do your staff feel comfortable using it?
- ▶ Are they aware of what should be reported?
- ▶ Is there anything you can do right now to improve things?

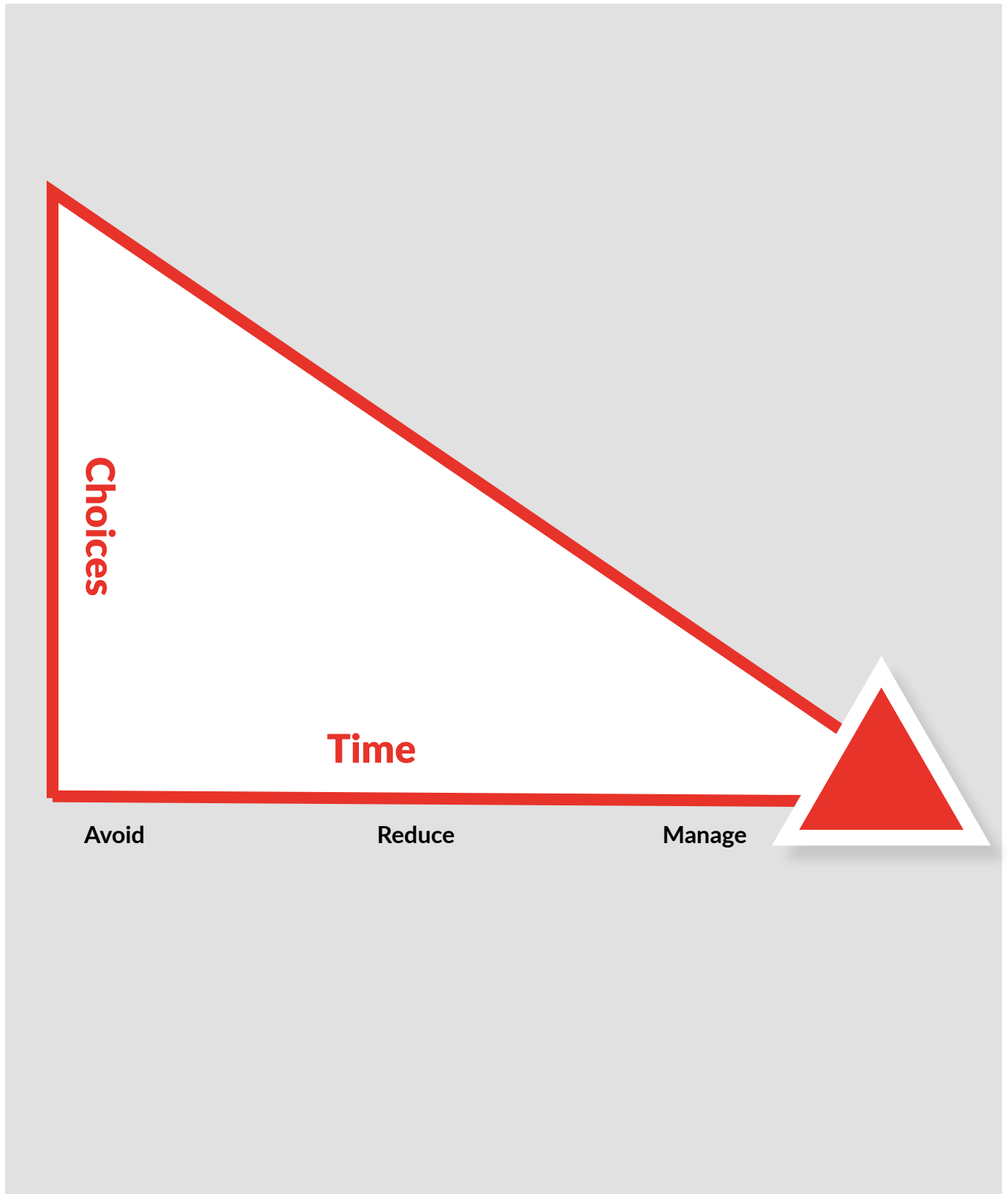
Managing risk assessment – a checklist

	Yes	No	Not sure
Is there a risk assessment for every role that you manage?	☐	☐	☐
Do you risk assess all the separate tasks carried out in a person's role?	☐	☐	☐
Do you revisit the risk assessment regularly?	☐	☐	☐
Do you revisit the risk assessment if an individual's circumstances change – pregnant, new role, health issue?	☐	☐	☐
Are your risk assessments documented?	☐	☐	☐
Are the risk assessments accessible by managers and staff?	☐	☐	☐
Do you encourage dynamic risk assessment?	☐	☐	☐
Are your staff trained in dynamic risk assessment?	☐	☐	☐

Dynamic Risk Assessment flow chart



Choices Triangle



Home Visits - Good Practice

- ▶ Read (and follow) the lone working policy
- ▶ Put the details of the appointment in your calendar
- ▶ Do a background check of the client. Check to see what they look like, if possible.
- ▶ Check the system for any warning markers about the client
- ▶ Check if colleagues have any further information regarding this client
- ▶ Look up the location on Google Maps and use street view as well to familiarise yourself with the area
- ▶ Research the kind of property the resident lives in
- ▶ Tell people where you are going
- ▶ Tell people when you expect to be finished
- ▶ Make sure your lone worker device is switched on and charged (if you have one)
- ▶ Make sure your phone is on and charged
- ▶ Update your next of kin details regularly
- ▶ Let people know your current car make, model and registration number
- ▶ Know the code word system if there is one
- ▶ Prepare a simple excuse to leave in case you ever feel uncomfortable, e.g. "I need some papers from the car" or "I just need to take this call."
- ▶ Know how to use any lone worker device or personal alarm quickly and discreetly
- ▶ Give yourself plenty of time to plan for the visit and to get to the location
- ▶ Let the client know you are coming. This will help you gauge their mood
- ▶ Consider visiting in pairs if practicable
- ▶ Wear good footwear
- ▶ Plan ahead where you are going to park. Do you want to have your car very close to the address?
- ▶ Would you rather the client doesn't see your vehicle?
- ▶ Take as little as possible with you on the visit
- ▶ Avoid carrying expensive equipment, which may represent a target
- ▶ Avoid taking any cash if possible
- ▶ Consider locking your car doors
- ▶ Park with your car facing outwards, ready for a speedy exit, should this be needed
- ▶ Don't leave anything on show in your vehicle
- ▶ Leave a voice memo on your lone worker device (if applicable) stating the exact location including postcode
- ▶ Check if you can be seen going into the property
- ▶ Check to see if anybody is hanging around outside the property
- ▶ Knock at the door and step back
- ▶ Let them go first into the property, saying "After you" to avoid being locked in
- ▶ Make the client overtly aware that other people know you are there
- ▶ Conduct ongoing dynamic risk assessment.
- ▶ Give yourself permission to walk away if you ever feel uncomfortable
- ▶ Look for signs of intoxication, drugs, alcohol etc
- ▶ Look at the resident's body language
- ▶ Do you need to go in? Consider doing your visit on the doorstep
- ▶ Look for possible escape routes
- ▶ Don't take off your shoes
- ▶ Offer to use shoe covers if necessary
- ▶ Look out for weapons or anything that might be a threat
- ▶ Look out for any potentially dangerous animals
- ▶ Sit closest to the escape route
- ▶ Trust your instincts
- ▶ Have a prepared excuse ready
- ▶ Leave if you feel uncomfortable
- ▶ Report everything
- ▶ Let people know when you are finished

Example risk assessment of the physical environment

Residential hostel

Issue with building and location	Possible solution	Who can help?
No car parking – need to park on street or local car park	Encourage staff to use a well lit car park Ensure staff use their LWD Ensure staff to share information about strangers or groups who may be hanging around	Include in induction Include in Personal Safety agenda item at staff meetings Encourage information to be put in any handover notes. Encourage incident reporting
Poor lighting outside the building	Improve security lighting in the porch	Liaise with line manager Talk to Health and Safety manager re risk assessment Raise with estate management
High hedge at the front of building which people could hide behind	Keep hedge cut	Raise with estate management
Only one door into the staff office which is very small	Have a 'hatch' system where you can talk to people securely without opening the door. Ensure the door is lockable Have a panic button installed linked to a central location Remove any objects that can be weapons Ensure desk faces the door	Talk to staff to get ideas Liaise with line manager Talk to Health and Safety manager re risk assessment Ensure emergency procedures covered in induction and training
There is no way of raising an alarm in the communal area	Fit panic button in communal area Always have LWD	Liaise with line manager Talk to Health and Safety manager re risk assessment Ensure emergency procedures covered in induction and training

Eight short scenarios to use with staff

Personal safety scenarios based on real reported incidents from housing and council sectors

Scenario 1

A receptionist and one housing advice officer are present in the housing office when at the end of the day an angry man comes in demanding to be seen immediately. He says if he doesn't get a house he'll set fire to himself. He smells of petrol.

Learning Points

- ▶ Ensure lay out of public-facing buildings are well set out to protect staff, with panic alarms in accessible locations, screens, accessible exits for staff and public
- ▶ Have a procedure in place in the event of an incident such as this and practise it to help protect staff and the public
- ▶ Be aware of and practise defusing techniques

Scenario 2

Home visit by member of anti-social behaviour (ASB) team following up an ASB complaint against a tenant who has a history of difficult and unpredictable behaviour.

Learning Points

- ▶ Dynamic risk assessment - Research the person – Who? Use company systems and records, phone a colleague, talk to staff from other agencies involved, use Google. Know as much as you can. This will help you decide if this should be a two-person visit
- ▶ Where? Could you meet in a different location where there is support? If you are conducting a home visit, think about how you do it. Refer to the document Home Visits - Good Practice
- ▶ What? Think about what task you are going there to do – if this is challenging their behaviour or giving unwanted news think about how the tenant might react. Practise and use techniques to defuse and de-escalate situations

Scenario 3

A member of grounds maintenance staff covering a large estate regularly gets verbal abuse and threats from certain residents for using equipment early in the morning and disturbing them. One morning a man comes out of his house brandishing a golf club, threatening assault if he doesn't stop working.

Learning Points

- ▶ Dynamic risk assessment - Assess Who? Who are the people in an area who are likely to cause concern? Report incidents and share information with other colleagues working in the area
- ▶ Control measures. Avoid the risk by planning work in these areas later in the day. Work in twos in that area when possible. Ensure you have your alarm and mobile charged and accessible
- ▶ Be aware of and practise techniques to defuse the situation if they approach you

Scenario 4

A member of support staff is lone working at night in a hostel for women who are victims of domestic violence. An older male sibling of a family turns up unexpectedly trying to gain access to the building. He regularly hangs about outside and tries to coerce the staff member into letting him inside. He is just constantly pressing the entry phone buzzer and pacing around the building but in a quiet way.

Learning Points

- ▶ Report the incident and share information. Ensure other staff and residents aware – share information on how to keep safe
- ▶ Dynamic risk assessment. Where? Ensure building is as safe as can be with good lighting outside, camera, secure entry system. Think about how staff can get safely in and out of the building
- ▶ Control measures in place for what to do when he turns up – alarms charged, mobile accessible, panic button procedure

Scenario 5

A cleaner/caretaker works early and late shifts across three complexes with a mix of residents. They are working alone often in the dark both outside and inside the communal areas.

Learning Points

- ▶ Dynamic risk assessment Be aware of surroundings all the time. Think about the buildings and how to work safely, such as shutting or locking doors behind you. Park in a well-lit place
- ▶ Control measures. Always have alarm and mobile charged and accessible and use them correctly and consistently. Have a system to let your line manager know that you have finished safely for the day
- ▶ Share information and report Have an information sharing system with wardens at the complexes to keep up to date with any residents who may cause difficulties. Report any concerning behaviour or incidents that occur, for example, drug dealing in an alleyway near the premises

Scenario 6

A member of the lettings team is meeting a prospective tenant who has been referred from probation and will be viewing a property. They have a history of assault and threatening behaviour.

Learning Points

- ▶ Dynamic risk assessment. Who? Find out what you can about the prospective tenant from other agencies. Google. If very concerned double up for visit
- ▶ Control measures. What? Utilise and activate alarm prior to viewing and have alarm and mobile accessible
- ▶ Arrive early and check property for access. Stand outside and let the prospective tenant enter and have a look around alone

Scenario 7

A member of staff works in a new project aiming to support isolated and unemployed tenants back into work. He has a tenant who constantly phones, emails and asks for home visits. This person needs a lot of support and is known to have inappropriate behaviour in terms of touching and invading personal space.

Learning Points

- ▶ Dynamic risk assessment. Who? – know as much about the background of the tenant as possible. Look at the company system, Google, talk to any other agencies involved
- ▶ Controls. Always use alarm and have mobile even when visiting frequently
- ▶ Set clear boundaries for both telephone and email contact as well as physical contact. If these are not adhered to report as incidents. Discuss whether lone working with this tenant is appropriate and avoid meeting alone at home

Scenario 8

A housing officer is now working from home following the COVID-19 break out. She has Zoom and telephone meetings at home with difficult tenants as well as other agency staff. Her older teenage children and partner are sometimes also in the house. She is used to making home visits but is now dealing with tenants on the phone or via social media. She has discovered that some tenants are phoning and emailing more frequently with all sorts of queries relating to COVID 19. They are often worked up, upset or angry.

One tenant phones (via the switchboard) at 5.00 pm every day just as she is about to finish for the day. This is difficult as her partner leaves for work then and her children need attention. She often has to spend a lot of time with this tenant calming her down. She has tried not answering the calls from 4.30 onwards and asking the switchboard not to put calls through so late but this results in a very angry call from the customer the following morning.

Learning Points

- ▶ Think about the working environment to ensure privacy when needed. Don't answer your mobile while moving around the house or doing things with the children. Wait until you are in your private workspace
- ▶ Take breaks and use stress management techniques to ensure you approach calls in a calm manner
- ▶ Set boundaries with repeat customers
- ▶ Be aware of and use techniques for difficult phone calls

How effective is your tracing system?

	Yes	No	Not sure
If a member of my staff did not return to the office/base on time I would be alerted and know exactly where they were last working			
If staff change their plans during the day they would always update their calendar or let me know			
Staff are equipped with a LWD where appropriate and they know how and when to use it			
I monitor the use of the LWD for all staff and raise lack of use in supervision sessions			
We have got an effective system for staff to raise an alarm discreetly in case of emergency and they all always use it			
If a member of staff uses their SOS to raise an alarm there is a robust procedure that I can follow			
We have got a very clear procedure to follow if someone does not come back on time or fails to return home			
I have access to next of kin contact information and it is up to date for all staff I manage			
My staff and their families have the contact details of myself or a colleague in case they do not return on time from work			

Summary of correct use of your lone working device

- ▶ Make sure you know how to use your device correctly, and most importantly, make sure you use it every time you are entering another building, house, flat, block, changing sites or travelling.
- ▶ Always keep it charged and always have it on your person. Don't put it at the bottom of your bag or on your dashboard.
- ▶ You must leave a voice memo for each visit. Do not simply rely on GPS as GPS may not update quickly enough in real time. Also GPS doesn't identify floors of a building or an individual flat within a scheme.
- ▶ You should say something like:
- ▶ 'It's xxxxxx. It's 10.00 o'clock. I'm carrying out a home visit at 39, Wendover Way, Canterbury CA4 7PG. It's a maisonette and the entrance is around the side. I'm seeing XXXX and I anticipate being 45 minutes.'
- ▶ Please remember that the LWD is personal protective equipment. If you have been issued with it, you must use it correctly and for each visit.
- ▶ Do not cherry pick when you think you should use the LWD and when you don't think you need it. People are unpredictable. That sweet old lady who you have seen so many times may today be very different or have a violent relative with her. Get into the habit of using your LWD correctly every visit.
- ▶ The LWD has an SOS call button on it. Once you activate this it will put you in direct contact with the Alarm Receiving Centre (ARC). They will listen in to what is happening and alert your line manager or the police – whatever is most appropriate. They will talk to you if they feel they can. If you have left a message with you whereabouts, they will have those details and will be able to quickly locate you to send assistance.
- ▶ Do not be afraid to use the SOS if you feel you need help. A false alarm is better than you being harmed.
- ▶ If you are having any problems with your LWD device contact your Health and Safety Team. It is no good to say – “Oh it never works properly” or “It keeps going off”. Sort it out until it works correctly and use it.
- ▶ Remember – there may come a time when the LWD saves your life!

Responding and support following an incident

	Individual	Team	Organisation
Within first 24 Hours of an incident	▶ Medical assistance ▶ Police attendance ▶ Contact family/next of kin ▶ Debrief/support ▶ Reporting with support if necessary ▶ Escorted home if appropriate	▶ To be informed of incident (even if not in detail) ▶ To cover workload of the individual ▶ Support – incident may affect team confidence/morale – ▶ Consider whether the aggressor may return and plan appropriate action	▶ Oversee and help with completion of incident form ▶ Oversee communication between teams and employees ▶ Consider potential for media interest and plan strategy to manage this ▶ Review safety of the work area and task
1-7 days after	▶ Further reporting of incident if necessary ▶ Refer to counselling if appropriate ▶ Continued support and contact from organisation ▶ Police interview if needed ▶ Refer to Victim Support if appropriate	▶ Debrief on incident and any updates ▶ Support colleague as necessary ▶ Cover workload of individual and forward planning ▶ Review local guidelines ▶ Provide opportunities for supportive discussion ▶ Signpost to any workplace support	▶ Receive feedback from employee involved ▶ Inform trade union where necessary ▶ Inform Health and Safety Executive and complete RIDDOR report if necessary ▶ Investigate incident and potential causes ▶ Legal advice for the organisation
7+ days after	▶ Follow-up by employer/Police ▶ Continued counselling and support if appropriate ▶ Legal advice and support for individual where necessary ▶ Discussions on how/when to return to work and any adjustments	▶ Review and amend policies and procedures in conjunction with management ▶ Conduct/partake in training	▶ Review and amend risk assessments, policies and procedures in conjunction with staff ▶ Provide training for staff and management

Supporting staff to manage their stress

- ▶ **Monitor staff sickness levels and any lateness** – sickness and lateness may be indicators that a member of staff may be stressed or finding things difficult
- ▶ **Encourage staff to recognise their own signs of stress.** These vary between individuals but may include being irritable, forgetting things, inability to concentrate, tearful, unable to sleep, fatigue or headaches. Look out for these signs of stress in your staff and teams. You can then refer them to appropriate support services
- ▶ **Ensure your staff take regular breaks during the day** – encourage staff to take their allocated breaks. Discourage them from eating on the go or at their desk. Suggest they go for a walk for half an hour or read a book somewhere quiet. Encourage staff to finish on time. Model this yourself!
- ▶ **Carry out relaxation or meditation techniques.** These can be quick 10 minutes exercises or longer sessions. There are many different length sessions available on the internet and YouTube. You can integrate a short relaxation technique into a team meeting. Signpost staff to **meditation exercises**
- ▶ **Plan and prioritise each day.** Encourage staff to plan their time well. Talk about time management and planning in staff supervision sessions
- ▶ **Encourage healthy and nutritious eating.** Bring fruit or nuts to staff meetings rather than biscuits and cakes and encourage your staff to think about their diets
- ▶ **Encourage staff to talk** about any incidents they experience or difficulties they are having with a buddy, in team meetings or in supervision sessions. Encourage an 'open and supportive' culture
- ▶ **Ensure staff are aware of other support services available** to them at work. These vary between organisations but can include: employee assistance programmes such as workplace counselling service, mindfulness sessions, a confidential talk with HR staff, counselling services provided through a trade union, in-house Mental Health First Aiders. You can also encourage someone to talk to their GP

External sources of support include:

'Access to Work' for support with physical adjustments and mental health support.

Access to Work

The Suzy Lamplugh Trust has a range of useful information about personal safety at work and stalking. [suzylamplugh.org/](https://www.suzylamplugh.org/)

Victim support is a free service which can provide help locally or have a national 24 hour helpline.

Help Guide - Stress at Work

MIND - tips on dealing with workplace stress

10 tips to deal with stress

Making Personal Safety Part of Your Work Culture

It is important that Personal Safety becomes a permanent part of the culture within your team, and that considering Personal Safety becomes second nature to your staff. Some practical, appropriate and realistic ways of keeping it on the agenda are listed below. This is not an exhaustive list.

Ways to keep Personal Safety on the agenda

- ▶ Aim to make Personal Safety 'the way we do things here'
- ▶ Introduce Personal Safety during induction - tell new members of staff about the ethos of your organisation. Check with them to see if the behaviour they encounter is consistent with this ethos
- ▶ Consider introducing the positive Personal Safety culture at interview stage
- ▶ Get your staff involved and keep them involved
- ▶ Invite them to Health & Safety meetings
- ▶ Ask for their genuine opinions on the policy and procedures
- ▶ Make reporting a positive process and always feedback. For staff to continue to report consistently they must see the benefit of doing it
- ▶ Publicise any actions planned via as many means as possible - e.g. via the organisation's intranet and social media, staff briefings, team meetings, internal newsletter and poster campaigns
- ▶ Lead by example
- ▶ Be consistent
- ▶ Show trust when checking on lone workers' use of any lone worker device system to avoid any suspicion of micro management
- ▶ Develop lone worker device super-users in your team. They can help all members of staff with any issues and can train others to use the lone worker device consistently and correctly
- ▶ Update lone working policies annually and circulate these
- ▶ Include Personal Safety as a standing item on the team meeting and 1:1 agendas
- ▶ Encourage dynamic risk assessments and a clear 'walk away' policy
- ▶ Support your staff with their decision-making whenever they do walk away from a situation where they felt uncomfortable
- ▶ Push for a Personal Safety 'champion' at board level
- ▶ Initiate 'safe and well' checks at the end of each day
- ▶ Update next of kin information and personal details annually
- ▶ Cascade monthly Personal Safety tips in the form of toolbox talks, internal communications and/or e-learning packages
- ▶ Check your staff have access to regular Personal Safety training sessions
- ▶ Encourage lone workers to become accountable and develop personal action plans when attending Personal Safety training
- ▶ Display 'zero tolerance' notices in offices and schemes
- ▶ Provide appropriate and timely post-incident support
- ▶ Promote any employee assistance programme (EAP)

This form is to record a discussion with your line manager relating to the training course you have completed. It is an opportunity for you to identify any areas that you would like clarification on or have concerns about. Please review the actions that you have identified and any progress you have made with these. Identify any support you may require and discuss this with your line manager. Your line manager may also raise any issues they have regarding your Personal Safety at work.

Name of Training Course:	Managing Personal Safety at Work training.		
Name of staff member:			
Job title:			
Name of of line manager:		Date of discussion:	
Key discussion points:			
Key actions to be taken:	By who?	Completed by?	
Staff member signature:	Line manager signature:	Health & Safety Signature:	
Date:	Date:	Date:	



Personal Safety ► Lone Working ► Training & Consultancy

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