

# Guidelines for OSHA's Alliance Program Participants: Alliance Products and Other Alliance Projects

(Effective date: September 9, 2014; revised June 28, 2018)

---

## Contents

- I. Introduction
- II. Overview of Product Goals, Messaging, and Other Characteristics
  - A. Goals
  - B. Audiences, Language Criteria, and Key Messages
  - C. Other Characteristics
- III. Product Development Process
  - A. Product Proposals
  - B. Review Process
  - C. Product Promotion
  - D. Updating Products
  - E. Product Evaluation
- IV. Required Standard Language
  - A. Required Disclaimer
  - B. Required Employer Responsibilities and Worker Rights Language
- V. Logos
- VI. Translations
- VII. Other Alliance Projects
  - A. Proposals
  - B. Project Plans
  - C. Project Evaluation

## I. Introduction

These guidelines establish expectations and procedures for activities that Alliances may conduct outside of routine outreach and dissemination, such as Alliance products and other projects. These guidelines apply to national Alliances. Regional and Area Office Alliances may apply these guidelines as appropriate.

Alliance participants may develop products, such as fact sheets, case studies, posters, toolbox talks, safety manuals, training tools, videos, and best practice documents. These guidelines define the expectations and requirements that apply to such products, including their goals, and the procedures for their proposal, development, review, promotion, update or withdrawal, and evaluation.

Alliance participants may also conduct other projects, such as training, concerted outreach events, and providing subject matter expertise for the development or updating of OSHA products. These guidelines specify procedures that apply to these projects, including proposals, tracking, and evaluation.

## II. Overview of Product Goals, Messaging, and Other Characteristics

### A. Goals

The principal goal of all Alliance products is to provide employers and workers tools and guidance to help eliminate and/or prevent workplace health and safety hazards. At a minimum, Alliance products will help employers comply with OSHA rules and standards. Ideally, however, Alliance products should help employers go "beyond compliance" by adopting best practices for the industry(ies) or hazard(s) that are their focus.

Alliance products should add value to existing OSHA or other workplace safety and health materials, fill gaps where such materials do not exist, or address an emerging issue. Alliance products should be more than a simple re-packaging of existing materials, unless the purpose is to convey the information via new and potentially more effective means, such as adapting text to a video format.

### B. Audiences, Language Criteria, and Key Messages

The audience for the product must be clearly defined and the products should be drafted with the audience in mind. The audiences are typically workers, employers, and/or occupational health and safety professionals. The products should use language and vocabulary appropriate to the target audiences, including translation for non-English-speaking segments of the workforce when appropriate.

Whatever their principal audience, products should always make clear that the employer has the primary responsibility under the law to provide a safe workplace. Products should not put the burden on employees to correct hazards, as they typically do not have control over the worksite, the equipment, or the rules in the workplace. Products must include information regarding employer responsibilities and worker rights under the Occupational Health and Safety Act of 1970. (See standard language in section IV below.)

### C. Other Characteristics

Alliance products are developed by Alliance participants with OSHA input and review, undergo a well-defined review process, and are expected to receive wide dissemination, primarily by the Alliance participants (see section III.E). Alliance participants own the products, but agree to make them available to the public for free.

Alliance products should strive to fill gaps in, or improve upon, existing materials focused on the hazards or issues they address. For example, Alliance products may be entirely new products, substantive updates in content or effectiveness to existing materials, or a reworking of existing technical materials for different audiences or purposes (such as for an industry lacking such materials tailored to its needs, translations of existing products for workers with limited English proficiency, or adaptations to different or complementary media, such as videos). The use of pictures, graphics or video material is strongly encouraged, whenever possible, to broaden the audience for which the products will be helpful.

The following are some examples of the types of products that Alliances have developed:

- Fact Sheets
- Cards
- Case Studies
- Posters
- Best Practice Documents
- Safe Operation Manuals or Procedures (or equivalent)
- Toolbox Talks
- Checklists
- Training Presentations
- Videos

### III. Product Development Process

#### A. *Product Proposals*

Alliance participants develop product proposals in coordination with the Alliance implementation team, including the OSHA Alliance Coordinator and OSHA subject matter experts. Proposed products should be aligned with an Alliance's goals and OSHA's priorities.

Alliance participants should use relevant data to help determine what products to develop, such as data that can help identify the most serious, widespread, or emerging hazards in a given industry or trade. Such data may include injury and illness rates, enforcement or On-site Consultation data, workers' compensation data, and information about the known and suspected exposures to hazards in an industry, as well as best practice controls.

Before proceeding with the development of a product, the Alliance participant must submit a product proposal to the OSHA Alliance Coordinator with the following information:

- Topic.
- Product Type (e.g., fact sheet, toolbox talk, video, etc.).
- Need for Product: Describe how the product would add value to existing resources from OSHA and other organizations, how it would fill gaps in this existing information, or how it would address an emerging issue. Provide any data to support the development of the product, including any data on the hazard to be addressed.
- OSHA emphasis areas supported.
- Timeline: Proposed timeline for developing a draft.
- Dissemination: Describe how the product would be distributed to stakeholders.
- Metrics/Evaluation: Describe how you would track the reach/impact of the product (e.g., web hits, number distributed, survey, etc.).

The OSHA Alliance Coordinator sends the proposal to OSHA subject matter experts for review. If the OSHA subject matter experts are in favor of developing the product, the OSHA Alliance Coordinator sends the proposal to the Office of Outreach Services and Alliance (OOSA) Director for a final decision on whether to develop the Alliance product. The OSHA Alliance Coordinator promptly notifies the Alliance participant of the decision.

Regional/Area Office Alliances follow a similar procedure for product proposals.

#### B. *Review Process*

After OSHA approves a product proposal, the Alliance participant develops a draft. The following outlines OSHA's review process for draft Alliance products.

- The Alliance participant submits the draft product to the OSHA Alliance Coordinator.
- OOSA completes an initial review and provides comments to the Alliance participant. (Note that this review may be eliminated if OOSA determines that the product is ready for OSHA subject matter expert review.)
- The Alliance participant submits an updated draft, based on the comments received from OOSA.
- The OSHA Alliance Coordinator forward the updated draft to the OSHA subject matter expert(s), who review the product. OOSA forwards any comments to the Alliance participant.
- The Alliance participant submits a final draft.
- OOSA may submit the final draft for review by OSHA's Office of the Assistant Secretary (OAS) in the following limited circumstances:
  1. the product addresses a high-profile or politically sensitive issue, or
  2. OOSA has questions about whether the product is consistent with OSHA's priorities and audience/messaging guidelines (see section II B, above).
- In those cases when OAS provides comments, the Alliance participant makes any additional changes to address OAS's comments and submits an updated final draft.

Regional/Area Office Alliances follow a similar review process.

#### C. *Product Promotion*

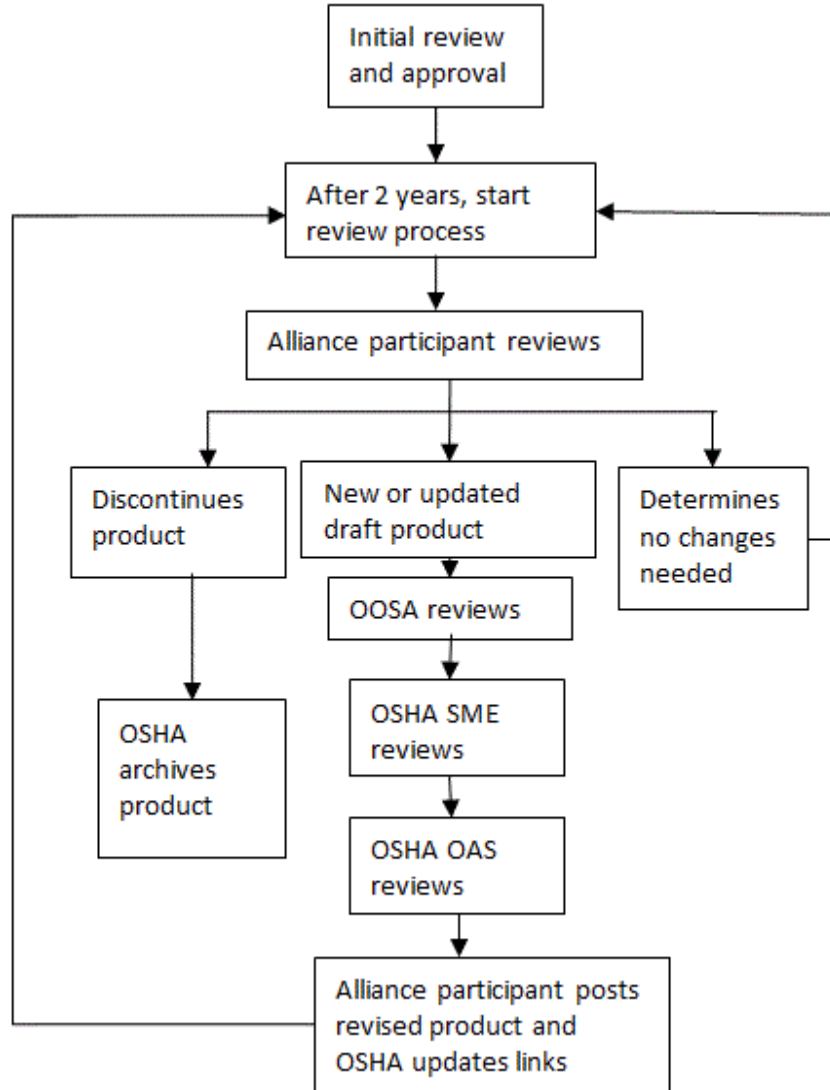
After final approval of the product:

- For national Alliances, the Alliance participant posts the product on its Alliance web page. To enable OSHA to link to the products, the Alliance participant must post the product in a format that is in compliance with the federal government's web accessibility guidelines. This generally means that the products must be posted in html or PDF text-based formats, not image-based PDF format. Videos must be close-captioned. After the Alliance participant posts the product, OSHA will add links to the product on OSHA webpages (Alliance and other relevant pages). OSHA will also consider promoting the product in *QuickTakes* and through social media.
- In addition to posting/linking to the products on their websites, Alliance participants are strongly encouraged to use other means of promotion, such as: 1) promoting or publishing the products through their newsletters, magazines, social media channels and other avenues; 2) distributing print or electronic copies of the products at events; 3) sending email alerts to their stakeholders; 4) making the products available to other interested stakeholders for distribution by them; and 5) distributing them through other outreach activities, such as conferences and similar events.

#### D. *Updating Products*

**Active Alliances:**

Alliance participants should periodically review completed Alliance products, together with OSHA. Products should be reviewed at least every two years (or sooner if warranted, such as in response to the issuance of a new/revised OSHA standard addressed in the product). Through this routine review, the Alliance participant(s) and OSHA will determine whether 1) no updates are necessary, 2) there is a need to update or re-format the product, or 3) the product should be discontinued. Updated products will be counted as an activity under the Alliance. (See flow chart below.)



*Alliance Product Review Flow Chart - Click chart for text version*

**Concluded Alliances:**

After an Alliance concludes, Alliance products are no longer considered Alliance products. The former Alliance participant removes the Alliance logo and revises the disclaimer (see section IV. A.). OSHA may continue to link to the product through the external link disclaimer.

#### E. *Product Evaluation*

In conjunction with the OSHA Alliance Coordinator, Alliance participants should design and implement ways to evaluate the impact of their Alliance products. This will often be an estimate of how many people received or viewed the product. Other evaluation methods may include surveys and the collection of anecdotal evidence of the product's impact.

#### IV. **Required Standard Language**

##### A. *Required Disclaimer*

All Alliance products must include the following disclaimer:

Through the OSHA and [insert name of Alliance participant] Alliance, [insert name of Alliance participant] developed this [insert product type] for informational purposes only. It does not necessarily reflect the official views of OSHA or the U.S. Department of Labor. [insert Month/Year]

Once an Alliance concludes, the disclaimer language must be changed to:

Through the OSHA and [insert name of Alliance participant] Alliance, [insert name of Alliance participant] developed this [insert product type] for informational purposes only. This Alliance concluded in [insert Month/Year] and OSHA is no longer involved in maintaining this product. It does not necessarily reflect the official views of OSHA or the U.S. Department of Labor. [insert Month/Year]

##### B. *Required Employer Responsibilities and Worker Rights Language*

Alliance products must generally also include the following standard language on employer responsibilities and worker rights. This can be included, for example, in a box or section at the end of the product. This standard language is not required for products where space is limited, such as cards.

Under the Occupational Safety and Health Act, [employers are responsible](http://www.osha.gov/as/opa/worker/employer-responsibility.html) (www.osha.gov/as/opa/worker/employer-responsibility.html) for providing a safe and healthy workplace and [workers have rights](http://www.osha.gov/workers/index.html) (www.osha.gov/workers/index.html). OSHA can help answer questions or concerns from employers and workers. OSHAs [On-site Consultation Program](http://www.osha.gov/consultation) (www.osha.gov/consultation) offers free and confidential advice to small and medium-sized businesses, with priority given to high-hazard worksites. For more information, contact your [regional or area OSHA office](http://www.osha.gov/html/RAmap.html) (www.osha.gov/html/RAmap.html), call 1-800-321-OSHA (6742), or visit [www.osha.gov](http://www.osha.gov).

**NOTE:** The Alliance participant can determine whether to include the parentheticals that spell out the URLs in the standard language above. For example, it may be helpful to have the URLs spelled out if the product will be printed.

#### V. **Logos**

Alliance products should include the Alliance logo and the logo of the Alliance participant. The Alliance logo is available at: [OSHA Alliance Program - Alliance Logo](#). The [OSHA logo](#) must not be included on Alliance products.

## VI. Translations

In addition to making sure that Alliance products use language and vocabulary consistent with their target audiences, OSHA encourages Alliance participants to translate Alliance products into the primary languages of any important segments of the workforce in their industries. The Alliance implementation team should determine if the language(s) of the target workforce makes a product a good candidate for translation. Many Alliance products have been translated into Spanish because of the large number of Spanish-speaking workers in the U.S. workforce, but other languages may also be appropriate. Alliance participants can use the OSHA English-to-Spanish dictionaries to help with translation of certain OSHA terms: [OSHA Dictionaries - English-to-Spanish and Spanish-to-English](#).

The following is an outline of the review process for Alliance product translations:

- A. The Alliance participant submits the draft translation to the OSHA Alliance Coordinator.
- B. OSHA reviews the translation.
- C. The Alliance participant makes updates based on OSHA comments and submits an updated draft.
- D. OSHA gives final approval to the translation.

If OSHA does not have staff available to review a translation, the Alliance participant may still translate the product. The translated product will not be considered an Alliance product, but the Alliance participant will be credited with a dissemination activity for making the product available to a Spanish-speaking audience.

## VII. Other Alliance Projects

In addition to developing products, Alliance participants may also undertake other projects, such as training, concerted outreach events, and providing subject matter expertise for the development or updating of OSHA products. These guidelines specify procedures that apply to these projects, including proposals, tracking, and evaluation.

### A. Proposals

Proposed projects should be aligned with an Alliance's goals and OSHA's priorities. Before initiating a project, Alliance participants must develop project proposals in coordination with the Alliance implementation team, including the OSHA Alliance Coordinator and OSHA subject matter experts.

Alliance participants can submit these proposals by email to their OSHA Alliance Coordinator or more informally through discussions with their OSHA Alliance Coordinator. Project proposals are not required for recurring activities (e.g., stand-downs) that have previously been approved or for activities that directly support an agency initiative or campaign (e.g., stand-down in support of the Fall Prevention National Stand-down, event for Safe and Sound Campaign).

Alliance participants should use relevant data to help determine what projects to pursue, such as data that can help to identify and focus on the most serious, widespread, or emerging hazards in a given industry or trade. Such data may include injury and illness rates, enforcement or On-site Consultation data, workers' compensation data, and information about the known and suspected exposures to hazards in an industry, as well as best practice controls.

Project proposals should include the following information:

- Project Description

- Need for the Project: Describe how the project would add value to existing resources or activities by OSHA and other organizations. Provide any data to support the project.
- OSHA Emphasis Areas Supported
- Timeline: Proposed timeline for completing the project.

The OSHA Alliance Coordinator reviews the proposal with OSHA subject matter experts. If the OSHA subject matter experts are in favor of pursuing the project, the OSHA Alliance Coordinator sends the proposal to the OOSA Director for a final decision on whether to pursue the project. The OSHA Alliance Coordinator promptly notifies the Alliance participant of the decision.

#### B. Project Plans

For selected projects, the Alliance participant works with its OSHA Alliance Coordinator to develop a project plan. Project plans are not required for all Alliance projects, but may be helpful for complex projects with longer timeframes or for projects that involve multiple participants in project development, promotion, and evaluation.

Project plans include the information provided in the proposal, plus a listing of project team members, more detailed milestones and timelines for completion, methods for distributing or promoting the project, evaluation metrics, and a commitment of resources.

#### C. Project Evaluation

In conjunction with the OSHA Alliance Coordinator, Alliance participants will design and implement ways to evaluate the impact of their Alliance projects, including estimates of the number of people reached by the project. Other evaluation methods may include surveys and collection of anecdotal evidence of the project's impact.