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

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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, Regional, and Area Office Alliances.

Alliance participants, who are non-OSHA personnel, may develop products, such as fact sheets, case studies, posters, toolbox talks, safety manuals, training tools, videos, and best practice documents.

Alliance participants may also conduct other projects, such as training and concerted outreach events. These guidelines specify procedures that apply to Alliance participants' products and projects.

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 video or multimedia formats.

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 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. OSHA facilitates and supports

Alliance participants' development of Alliance products, and approves final products that are issued with the Alliance logo.

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*

OSHA must approve a product proposal before OSHA resources will be used to support an Alliance participants' development of a product. Alliance participants develop product proposals and submit them to the OSHA Alliance Coordinator. 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 participants 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.).

OSHA reviews the proposal to assess whether developing the product would further the Alliance's goals and OSHA's priorities. The OSHA Alliance Coordinator promptly notifies the Alliance participants of OSHA's decision.

B. *Product Development*

After OSHA approves a product proposal, the Alliance Program participants develop a draft product. OSHA's role during the development of the product is solely to respond to technical questions. Development of the final content and format of the draft product is the responsibility of the Alliance Program participants. Once a draft is developed, it will be shared with OSHA to initiate the review process. All Alliance partners must approve the finished work product for it to be considered final and sent to OSHA for review.

C. *Review Process*

The Alliance participants submit the draft product to OSHA's Alliance Coordinator. The OSHA Alliance Coordinator and OSHA subject matter experts review the draft Alliance product to ensure that it is consistent with the approved product proposal, is technically accurate, and is consistent with OSHA's policies and requirements, and resolve any concerns regarding the contents of the product with the Alliance participants. If the product addresses a high-profile or politically sensitive issue, or OSHA has questions about whether the product is consistent with agency priorities and audience/messaging guidelines (see section II B, above), the product may require additional review by the Office of the Assistant Secretary.

D. *Product Promotion*

After OSHA completes its review and approves an Alliance participants' product:

- For national Alliances, the Alliance participants post the product on the Alliance participants' web page. To enable OSHA to link to the products, the Alliance participants 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 participants post 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.
- All 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 theirs 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.

E. *Updating Products*

Active Alliances: Alliance participants should periodically review completed Alliance products. Active Alliance participants should review products 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) and report to OSHA one of the following: 1) no updates to the product are necessary, 2) there is a need to update or re-format the product, or 3) the product should be discontinued. If the Alliance participants and OSHA agree that updates to a product are necessary, the Alliance participants will update the product and submit it to OSHA for review, which OSHA will conduct following the same review process described above (see sec. III.C.). Updated products will be counted as an activity under the Alliance. (See flow chart below.)

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

F. *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 Alliance between OSHA's [insert OSHA office] and [insert name of Alliance participants], [insert name of Alliance participants] 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 Alliance between OSHA's [insert OSHA office] and [insert name of Alliance participants], [insert name of Alliance participants] 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 (www.osha.gov/workers/employer-responsibilities) for providing a safe and healthy workplace and workers have rights (www.osha.gov/workers). OSHA can help answer questions or concerns from employers and workers. OSHA's On-Site Consultation Program (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 (www.osha.gov/contactus/bystate), call 1-800-321-OSHA (6742), or visit www.osha.gov.

NOTE: The Alliance participants 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 participants. 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.

OSHA will review translated Alliance products for technical accuracy to the extent that resources permit. Alliance participants should submit draft translations to the OSHA Alliance Coordinator, who will forward the translation to the appropriate OSHA staff for review. If OSHA does not have staff available to review a translation, the Alliance participants may still translate the product. The translated product will not be considered an Alliance product, but the Alliance participants will be credited with a dissemination activity for making the product available to a non-English-speaking audience.

VII. Other Alliance Projects

In addition to developing products, Alliance participants may also undertake other projects, such as training and concerted outreach events. These guidelines specify procedures that apply to these projects, including proposals, tracking, and evaluation.

A. Proposals

To ensure that projects are aligned with an Alliance's goals and OSHA’s priorities, Alliance participants must develop project proposals before initiating an Alliance project.

Alliance participants can submit project 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.

OSHA reviews submitted proposals to assess whether the project would further the Alliance's goals and OSHA's priorities. The OSHA Alliance Coordinator promptly notifies the Alliance participants of OSHA's decision.

B. Project Plans

For selected projects, OSHA may request that the Alliance participants develop a project plan in consultation with the OSHA Alliance Coordinator. 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.