Successful Ergonomics Teams:

By
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Humantech was founded with the single focus of improving the lives of the working population. For nearly 40 years, our approach has changed how organizations use the science of ergonomics to improve workplace performance.

We’re experts in workplace improvement. Big project or small, we bring tangible benefits to you and your company at every step. Whether you need to deploy a global ergonomics initiative or a single risk assessment, we partner with you to achieve your goals. We listen well, work hard, and evaluate ourselves based upon your success.

We are the largest consulting team of Board Certified Professional Ergonomists in North America. Humantech consultants combine expertise in ergonomics with practical industry experience and the skills of professional services delivery.

Our software solutions help you take control of your ergonomics process. Humantech’s proprietary assessment and solution tools, e-learning, and central online system give you a faster, more effective and efficient way to manage ergonomics corporate-wide.

A team of highly qualified professionals with skills in e-learning and software development, industrial and graphic design, sustainability, and information technology supports our consulting staff.
Find and fix your high-risk jobs quickly with our experts at your side.

The Humantech System® is an all-in-one solution for managing workplace ergonomics in industrial environments.

Learn
Online Training
Build knowledge quickly. Access 7 interactive online training modules covering everything from principles of ergonomics to design guidelines. You choose which modules are appropriate for your teams.

Do
The Job Improvement Process
Gain skills to assess and fix jobs. Once the online training is finished, your teams will work alongside our Certified Professional Ergonomists to assess and improve problem jobs.

Manage
Data and Reporting
Verify and track progress. With The Humantech System, ergonomics process owners can easily monitor the activities of the ergonomics team, track the status of improvement plans, and generate reports.

Learn more at www.humantech.com/thesystem
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Prior to joining Humantech, Jennie worked as an Assistant Ergonomics Program Coordinator for Colorado State University, where she conducted ergonomic evaluations, performed workers’ compensation claim investigations, and redesigned workspaces. In addition, Jennie worked with the university’s Department of Transportation, where she managed program development initiatives and the driver’s training program, and maintained the driver qualification file management system.

Jennie received a Bachelor of Science in Psychology and a Master of Science in Occupational and Environmental Health, specializing in Ergonomics, at Colorado State University. She has achieved recognition as a Certified Professional Ergonomist and Certified Safety Professional.
Contents

Introduction .............................................................................................................. 2

Successful Ergonomics Teams:

Why form ergonomics teams? ................................................................. 3

What does a team do? ............................................................................. 4

Who should be on the team? ................................................................. 7

Where does this type of team work best? ............................................. 10

When is the right time to launch a team? ............................................. 11

How to manage your team? ................................................................. 12

Final Thoughts .......................................................................................... 15

Additional Resources ............................................................................... 16
Introduction

In our many discussions with clients and colleagues in industry, we hear a common belief in successfully managing workplace ergonomics: you must have an ergonomics team. For many, it is true that an ergonomics team is critical for the success of their ergonomic improvement process. But not all organizations, workplaces, and company cultures are set up for, or would benefit from, the team approach.

This e-book was created to share insight and best practices on when and how to leverage an ergonomics team. By sharing our experience and knowledge of these teams, we hope that you will be able to make informed decisions about establishing an ergonomics team for your organization, or to improve the management and operation of the team you currently have.

We invite your comments, questions, and reactions to this e-book on our blog, The 30-Inch View. And if you enjoy what you read, please feel free to share it with colleagues and co-workers.
Why form ergonomics teams?

The idea of forming teams of employees to assist in improving ergonomics is not new. In the U.S., guides provided by NIOSH and OSHA have promoted this concept for over 30 years. Also referred to as participatory ergonomics, the practice has been adopted by many employers. But there is no requirement that specifies creating an ergonomics team. In fact, in our review of the 168 global regulations regarding ergonomics, no country, state, or province requires the formation of a team. (In the U.S., 17 states require employers to establish safety committees).

So why form a team for ergonomics? After all, it takes extra time, commitment, effort, and resources to run such a team. The answer is two-fold: participatory ergonomics has been proven to improve employee participation and uptake, and ergonomics teams increase speed and effectiveness of workplace changes. Published research studies have concluded that involving employee teams in ergonomic improvements adds significant value by:

- reducing MSD symptoms,
- reducing MSD injuries and claims,
- reducing lost work days and absence.
- improving employee participation and practices,
- improving the acceptance of change (engineering controls),
- speeding up the job improvement process, and by
- expanding ideas for improvement.

Similar to improving safe work practices through a safety management system (for example, ANSI Z10, OHSAS 18001, and Draft ISO 45001), employee participation is equally important in affecting changes in the workplace. This includes practices that improve ergonomics and reduce MSD risk factors. Employee participation is spelled out as a key and equal element of safety, environmental, and quality management systems.

Engaging employee representatives is one key to a successful ergonomic improvement process. Now that we have an understanding of why we should use ergonomics teams, we know they can provide great benefits as long as they are doing the right thing.
What does a team do?

Let’s talk about what these ergonomics teams should do. To add value, the activities of ergonomics teams must be focused on the goal of the ergonomics process. The most common activities of ergonomics teams include the following:

- Conducting MSD risk assessments
- Leading the job improvement process
- Conducting follow-up assessments
- Tracking key measures
- Communicating information about ergonomics
- Acting as liaisons between employees and management

Ergonomics teams are just one part of the support structure necessary for an ergonomic improvement process. This support structure is discussed in our e-book, *Three Ways to Establish a Strong Foundation for Your Ergonomics Process*. The team is at the top of the triangle, part of the group of subject matter experts. These are people with specialized knowledge, skills, and tools who provide tactical assistance in the ergonomics process. Team members are partners with, and provide different but complementary services to, engineering, medical services, and health and safety professionals.

Ergonomics team members are the eyes and ears of supervisors and managers, monitoring jobs and tasks within their areas of responsibility. Team members should screen for and, if needed, conduct risk assessments to measure exposure to MSD risk factors, and help facilitate projects to improve ergonomics and reduce the level of risk.
### POSITION | ROLE
--- | ---
Management Sponsor | Establish and sustain high-level goal, resources, and support.
Ergonomics Process Lead | Coordinate implementation and on-going of ergonomic improvement process.
Ergonomics Team Members | Help guide and perform job improvement steps. Monitor for workplace changes. Assist in measuring MSD risk.
Engineers & Maintenance | Apply good ergonomic design in the specification, selection, layout, and modification of equipment, tools and workplaces. Ensure designs are low MSD risk.
Managers & Supervisors | Ensure MSD risks are identified and reduced in their area of responsibility.
Employees | Correctly adjust and use equipment and tools. Escalate concerns when needed.
Medical/Worker’ Compensation | Manage medical care, workplace claims, injuries, return to work, and injury reporting.
Site Safety Staff | Provide technical assistance.
Product Designers | Include good ergonomic design in the assembly and service of products.

One key to establishing a support structure for your ergonomics process is to clearly define the roles and responsibilities of each position. This applies to the ergonomics team; each team member should know what his or her role is and what specific actions or tasks are expected.

Supervisors must also understand these roles and responsibilities in order to ensure that individuals are available to serve on the team, evaluate their performance on the team, and hold them accountable to their responsibilities.

We’ll talk more about holding people accountable later.

Well-defined roles and responsibilities provide the learning objective from which to deliver skills training for team members (more on this later, too).

One of your safety team's primary responsibilities is to follow the job improvement process. This is a simple, continuous improvement process that begins with a **Find It** step during which trained team members conduct MSD risk assessments to determine where exposures exceed an acceptable level. The results of the risk assessments enable you and your ergonomics team members to identify which jobs and tasks must be addressed.
The next step is **Fix It**, which means making the change to the workplace to reduce exposure to MSD risk factors. Team members can't reduce MSD risk without changing the design of the workplace. Trained team members use design guidelines to determine how to best change the workplace to fit people. Typically, engineering and maintenance should be involved to apply these design guidelines properly.

Engineering controls are a proven way to manage MSDs, which is why it's so important to pursue them. But it is crucial for team members to engage operators to help identify and select the engineering changes that will reduce the risk. This is another form of participatory ergonomics, and will increase employee buy-in and likelihood of use once an improvement is implemented.

Any change or improvement must be checked to verify that it actually reduced the level of exposure. During the **Check It** step, team members use the same risk assessment tool to conduct a follow-up assessment.

The last step is **Sustain It**. It is the responsibility of both the ergonomics team and management to ensure that the improvements are maintained and used, and to look for opportunities to duplicate effective improvements at other similar workstations. This is a simple continuous improvement process based on Plan, Do, Check, and Act. Additional information about the job improvement process is available in our Deployment e-book.
Who should be on the team?

The makeup of your team should be based on the goal of your ergonomics program and the roles and expectations of team members. For a discussion about goals, roles, and responsibilities, see our e-book *Three Key Elements for Establishing a Strong Foundation for Your Ergonomics Process*.

The key to a successful ergonomics team is to have cross-representation of key roles and capabilities within your organization. Typical ergonomics teams include the following participants:

- **Line employees.** Like a safety committee, line employees from several key areas across the organization represent the perception and interests of other line employees. Line employees may also represent supervisors from their areas. You’ll want to have several line employee representatives. These people can ensure that all steps of the Find It - Fix It - Check It - Sustain It process are completed.

- **Supervisors and managers.** A couple of key managers or supervisors can make decisions regarding day-to-day operations and help identify improvements in the workplace. Their presence also demonstrates that leadership is engaged.

- **Engineers and maintenance personnel.** One or two individuals from the engineering organization and maintenance group are valuable. In an office work environment, this should include space planners or facilities personnel. Since individuals from these areas are involved with the equipment, tools, and layout, their role is supporting the engineering design of improvements. They provide the expertise for Fix It activities.

- **Medical personnel.** Some teams include a representative from the medical staff. Their presence is mostly to ensure that there is communication and coordination between the ergonomics team (prevention activities) and medical personnel (injury management). This is a good way to ensure that MSD injury investigations include a quantitative risk assessment completed by a team member.

- **Sponsors.** Successful ergonomic improvement processes are driven from the top. This means having a leader at the top of the organization sponsor and drive the process. Ideally, the sponsor should routinely communicate with the
Make sure you select the right individuals for each role; you want heroes, not zeros, on your team. Good ergonomics team members have these strengths:

- **Reliable.** They can be trusted to participate and contribute to the team meetings and activities, they will apply assessment and design criteria accurately, and will systematically document their progress through the job improvement process.

- **Participative.** Not only do they participate and carry their own weight on the team, but they are known to work well on teams and lead others by example.

- **Innovative.** This is critical when it comes to the Fix It step. Identifying and selecting the best engineering control may require “thinking out of the box” and engaging line employees for their ideas.

- **Communicative.** They are good communicators within the team, but also provide information and updates to the supervisors and employees in the area they represent. They also help communicate issues, ideas, and questions from their departments back to the team.

- **Knowledgeable and skilled.** Individuals should be chosen because of the knowledge, skill, or authority they have. These include things like problem solving, concept design, documentation, following a CI process, or their capability of getting things done within the organization.

- **Results-oriented.** They are able to drive themselves, and the rest of the team, to systematically find and fix MSD risks.

This is a lot of representation and a lot of characteristics. It sounds like you need a large team. We are often asked, “How big should an ergonomics team be?” The real answer is “it depends.” It depends on how large your organization is, how many workstations there are, and the amount of your MSD risk. It also depends on how many people, and their time, your management team will commit to support. In our experience, teams (ergonomics, safety, and other) are best managed when they consist of not more than 20 people. This number seems to be enough to make up for turnover on the team while still maintaining regular activities.
In our benchmarking study, we evaluated the resources invested in site ergonomics programs. This included the number of people and the time they spend supporting ergonomics team activities. Here’s what we found:

- Team size ranged from 1 to 28 people. The average was 12 members on an ergonomics team.

- The ratio of team members to total employees varied widely. Managing by ratio is not a good idea because it may not be a realistic number for your site.

- The time designated for ergonomics team members to perform their roles ranged from 1 to 8 hours each month

We hope this provides you with some guidance in determining who and how many people will be needed on your team.
Where does this type of team work best?

Determining in which workplaces, organizations, and work cultures an ergonomics team will be successful is a difficult question to address and one that should be answered early in the creation of the team. But it needs to be addressed honestly because not all workplaces and organizations are conducive to establishing and sustaining a team.

Based on our experience with a wide range of industries and organizations, there is a broad range of factors to consider when determining if an ergonomics team will work for your organization.

<table>
<thead>
<tr>
<th>TEAM</th>
<th>NO TEAM</th>
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<tbody>
<tr>
<td>• Sponsorship from top leaders</td>
<td>• Lack support from team leaders</td>
</tr>
<tr>
<td>• Team-based culture</td>
<td>• Not a team-based culture</td>
</tr>
<tr>
<td>• People working together</td>
<td>• People working alone</td>
</tr>
<tr>
<td>• Shared workstations</td>
<td>- Delivery</td>
</tr>
<tr>
<td>- Production</td>
<td>- Field</td>
</tr>
<tr>
<td>- Warehousing</td>
<td>- Office</td>
</tr>
<tr>
<td>• Able to change workplace</td>
<td>• Personal workstations</td>
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</tbody>
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The best places for sustaining an effective ergonomics team have these characteristics:

- Common workplace with shared workstations (for example, production, manufacturing)
- Team-based culture
- Good collaboration and team work
- Strong support and sponsorship by top leaders
- Workplace layout and equipment can be changed or modified

As stated earlier, establishing an ergonomics team is not a regulatory requirement. And for some organizations, the team-based approach is not a good fit. For some work environments or portions of your operations, you may be better off not using a team.
When is the right time to launch a team?

Launch your ergonomics team as early as possible when beginning your ergonomics process, but not until the appropriate foundation is in place.

In Humantech’s Engagement Model, ergonomics teams are prepared and begin working in the fourth step, Deployment. But before that happens, key decisions and commitments are made by top management in the Foundation and Leadership steps. These two steps are where the responsibilities and actions of team members are spelled out, and leadership commitment is made on the number of team members and the time team members have available to serve in their roles.

During the Deployment step, the first priority is to train and prepare your ergonomics team members. Once they are ready, they need to follow the job improvement process to systematically find issues, fix them, and check that MSD risk exposures are reduced to a low, acceptable level.

Bear in mind that Deployment is not a onetime event, but a launch and sustained ongoing process of improvement. So once you launch, there is no endpoint, at least not until you’ve reduced all MSD risk to a low level. (Of course, then you also must deal with the ongoing introduction of new equipment and modification and moves of existing equipment.)

Similarly, sustaining and maintaining the ergonomics team is ongoing. Once you’ve trained and prepared people, and then put them to work, it is an ongoing process to monitor their progress, provide feedback, and hold them accountable for results. You will also need to continually replace employees who leave the team due to retirement or job changes…which leads us to How.
How to manage your team?

Numerous management courses are available that describe how to prepare and manage people and lead teams. The foundation, dynamics, and “care and feeding” of ergonomics teams is based on the same management techniques that apply to other teams (for example, safety committees and quality teams). Here, we will focus on three key elements for establishing and supporting members of an ergonomics team: preparation, ongoing support, and accountability.

Preparation

Preparation is getting each team member and his or her immediate manager to agree and commit to the roles and responsibilities outlined for them. Before committing to be on the ergonomics team, an individual and his or her supervisor must know and understand what is expected of them (the roles and responsibilities). This includes knowing the activities they will be asked to carry out, what training they will need to complete, expectations for results, and the time allocated for their participation.

It’s helpful to spell out the performance expectations for the team member. This way, both employee and supervisor will know and commit to these expectations. Supervisors must fully support employees and be prepared to ensure that employees are recognized and held accountable for their participation on the team. These roles and responsibilities also become the learning objectives from which to develop training for ergonomics team members.

<table>
<thead>
<tr>
<th>POSITION</th>
<th>ACTIONS</th>
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<tbody>
<tr>
<td>Management Sponsor</td>
<td>• Establish a common goal and metric for site ergonomic program</td>
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<tr>
<td></td>
<td>• Ensure site plans and goals are established</td>
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<tr>
<td></td>
<td>• Commit adequate resources (staffing and funding) to support program</td>
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<tr>
<td></td>
<td>• Review and track progress to goal</td>
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<tr>
<td></td>
<td>• Identify an Ergonomics Process Lead</td>
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<tr>
<td>Ergonomics Process Lead</td>
<td>• Ensure all applicable components of the program are implemented and</td>
</tr>
<tr>
<td></td>
<td>sustained</td>
</tr>
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<td></td>
<td>• Track measures and progress to goal regularly</td>
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<tr>
<td></td>
<td>• Report progress to top management at least quarterly</td>
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<tr>
<td></td>
<td>• Ensure process documentation is maintained and complete</td>
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<tr>
<td></td>
<td>• Maintain records of annual process evaluation and review</td>
</tr>
<tr>
<td>Ergonomics Team Member</td>
<td>• Evaluate workstations and tasks for MSD risk factors</td>
</tr>
<tr>
<td></td>
<td>• Rank and select risk factors to control</td>
</tr>
<tr>
<td></td>
<td>• Confirm reduction of identified risk factors</td>
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<tr>
<td></td>
<td>• Provide information and assistance to area employees and managers to</td>
</tr>
<tr>
<td></td>
<td>address risk factors</td>
</tr>
<tr>
<td></td>
<td>• Maintain documentation of risk reduction activities and results</td>
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Training is a vehicle for ensuring each team member has the skills, ability, capabilities, and confidence to fulfill their role. It also ensures that everyone is “working from the same page.” This is best accomplished through skills training, which develops each team member to become a subject matter expert. After completing the training, team members should be able to follow the same job improvement process, use common assessment and solution tools, and establish a common language and system to communicate with others in the ergonomics support structure. It is our experience that with 8 to 12 hours of structured training (classroom or blended learning), team members can be prepared to effectively find and fix MSD risks in the workplace.

The activities of training together and working with each other are ways to build teamwork. Working as a team does not mean that multiple team members are required to conduct an assessment, identify the root causes, determine improvements or conduct a follow-up assessment. Rather, by working with common tools and process, one person might complete an assessment, another person could then use the results of the assessment to determine the root causes and work with operators to determine the best fix, and then a third person would implement the improvement (fix). Like a sports team, they work together to complete the play or, in this case, to reduce the MSD risk.

Although all team members have the same education in ergonomics and job improvement, they will soon discover that different members have specific abilities or “specialties” to contribute. For example, some team members may possess the attention to detail that’s required to ensure all assessments and improvements are documented. Others may have a spatial and mechanical aptitude for identifying root causes and engineering controls that reduce risk, find they are good at completing accurate risk assessments quickly, or be able to compile the team’s results and communicate their progress to illustrate improvements.
Ongoing Support

Once the team is formed and active, it is critical that they receive ongoing support to sustain their focus and momentum. This is a real challenge for any team comprised of volunteers. Here are some of the most common, and most effective, practices for providing ongoing support of ergonomics teams:

- Conduct regular team sessions. These are working sessions during which team members get together to review the assessments and improvements that have been made, plan the next jobs to improve, and review their current projects to ensure follow-up assessments and documentation are completed.

- Provide coaching and refresher training. When assessment and problem-solving tools are not used, people tend to lose confidence in their ability to use them correctly. Side-by-side coaching is a good way to provide real-time feedback to team members to either correct or reinforce their application of ergonomics tools and process.

- Track progress to goal. The ultimate goal of the job improvement process is to reduce the level of exposure to MSD risk factors in a task. This is usually stated in the organization’s goal for the ergonomics process. The ergonomics team is critical in helping to achieve this goal, so it should track its progress at least monthly. The team should also track if they are achieving specific activity targets (for example, number of risk assessments completed, percent of improvements implemented, and percent reduction of risk level).

- Provide reinforcement and recognition. Team members need to know how they are doing. As a team, are they achieving what is expected? As individuals, are they meeting their responsibilities? What can they do to improve? Take time to provide regular feedback both to improve and to give recognition then things are done well.

Accountability

Finally, and most importantly, ergonomics team members (as well as everyone in the support structure) should be held accountable for their contribution to helping the organization achieve its goal of reducing MSD risk. Ensure accountability using the same performance and results methods for which employees are held accountable in their jobs, using regular feedback and the performance appraisal process. Think about it …if you are going to invest the time to prepare and train people to be successful in their roles and responsibilities, there must be checkpoints to verify that they are indeed successful. For ergonomics team members, this should focus on their completion of MSD risk assessments, job improvement projects, and their level of involvement in reducing overall MSD risk.
Final Thoughts

Leveraging a team of employees, representing cross-functions of an organization, to serve as subject matter experts in ergonomics has been proven to add value in effectiveness and acceptance of workplace changes, plus expand accountability for MSD risk reduction. This works for many companies and workplaces, but not all. In this e-book we’ve outlined key elements and best practices for forming and managing an ergonomics team. It’s helpful information, but many ask “Where do I start?”

Whether you are forming your first ergonomics team, or trying to re-establish an existing team, the following steps have worked for us:

1. Define roles and responsibilities of ergonomics team members.
2. Get commitment from leadership for people and their time.
3. Recruit the right people and get commitment from their managers.
4. Develop skills, knowledge, and capabilities through skills training.
5. Put the team to work. Follow the job improvement process of Find It - Fix It - Check It - Sustain It.
6. Track and monitor progress, for individuals and the entire team.
7. Provide feedback, reinforcement, and recognition.
Additional Resources


