

## **Chapter 3**

### **Implementing a Checklist Program**

A special note to school administrators on the selection of the safety and health coordinator:

In the spring of 1992, the Safe Schools Manual was pilot-tested in several New Jersey public high schools. The test results indicated two important recommendations about the checklist program coordinator (who is referred to in this edition of the Safe Schools Manual as the Safety and Health Coordinator).

1. The person should have a background in vocational-technical education and sufficient authority to supervise teachers in completing the checklists. N.J.A.C. 6A:19-10 requires a designated person to implement the school's vocational-technical education safety and health program. The Safety and Health Coordinator would be the logical designee. Other possible candidates to coordinate the checklist program include: the principal, the Right-to-Know coordinator, the vocational-technical education director, a supervisor or chairperson of vocational-technical education courses, a school health and safety committee representative, the buildings and grounds supervisor, the designated person for asbestos, the school business administrator, or a well-respected and experienced teacher.
2. The person should be given sufficient time to do the job right. Pilot test coordinators felt that the success of the program would be seriously compromised if the person had too heavy a workload.

## Safety and Health (S & H) Coordinator Instructions

You have been selected to be the coordinator of your school's checklist program. A well-run checklist program can help launch your school's environmental, safety and health efforts or it can strengthen an existing program. How do you get started?

One of several possible ways to develop a checklist program is described below. You can use this strategy, adapt it to fit the unique needs of your school, or create your own. Whatever you do, set realistic expectations. In the first year of your school's checklist program, it may not be feasible to evaluate all of the programs. You may want to do a phased-in approach, selecting to do first the courses with the most potential for hazards. Your program is more likely to be a success if you carry out a solid plan in small doses than if you use a haphazard, scatter gun approach and turn everybody off.

The Safe Schools checklist program has three major features:

- You, the person who coordinates the program and trains teachers and others to use the checklists. In the Safe Schools Manual, you will always be referred to as the S & H Coordinator (Safety and Health Coordinator).
- A plan and procedures for teacher training, checklist dissemination, follow-up and record keeping.
- Trained teachers, safety committee members, and/or other individuals to use the checklists regularly in vocational-technical education and career orientation classrooms, shops and labs.

The checklist program is described in greater detail on the following pages.

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## Implementing the Checklist Program

Described below is a possible "blueprint" for you to follow when setting up the checklist program. Use it as a guide, tailoring it to the needs of your school. Please also refer to "Appendix A: Resources," to help you identify people who can help you answer questions that may come up.

### A. Advance Preparation

1. Attend one of the Safe Schools training sessions sponsored by the New Jersey (NJ) Department of Education through the NJ Safe Schools Program. Contact the NJ Safe Schools Program team at 732-235-9085 or 9095 or -4988, or by e-mail at [cscbre@sph.rutgers.edu](mailto:cscbre@sph.rutgers.edu) for additional information.
2. Review the material covered in the Safe Schools Manual, especially in this chapter. (Please skim the checklists in Chapter 4 and "Appendix E: Selected Statutes and Regulations.")
3. Complete 1-2 checklists to get a feel for using them.
4. Prepare a checklist program plan for teacher training, checklist selection and use, follow-up, and record keeping. (These topics are discussed in greater detail below.) Involve the appropriate school personnel, such as the safety committee, school principal, supervisors, teacher representatives, etc. in the development of the plan.

### B. Selecting Checklists

1. Review the Program Index to Checklists located at the end of this chapter (with a tab labeled Program Index.) This index was designed to help you decide what checklists are needed for each course or program and to help you keep track of when checklists are given out and returned. It contains:
  - Lists of career-technical-vocational education and career orientation programs offered in NJ public secondary schools. These lists are first grouped broadly by topic, (they are referred to as Major Programs in the table of contents for the Index). Then under each major career-technical-vocational education program, are listed generic program names. (If you do not find the exact program or class name you are looking for, find the one(s) which most closely resembles your program.)

- Names and page numbers of the checklists that potentially apply to each list of career-technical-vocational and career orientation programs.

The career-technical-vocational Career Cluster Program Index to Checklists is divided into three categories:

- **Applicable Checklists--All Programs.** This part of the Index lists checklists that should be completed for all vocational-technical education classes, shops, or labs at your school.
- **Potentially Applicable Checklists--All Programs.** This part of the Index lists checklists that deal with regulations concerning "generic" hazards found in shops or classrooms. These checklists would apply to a program if the teachers or students use the item, have the item in the classroom, or perform the procedure indicated. For example, you would not need to use the "Fixed Ladders" checklist if the classroom, shop, or lab does not have fixed ladders.
- **Potentially Applicable Checklists--Grouped by General Program Areas.** This is the biggest part of the Index. The checklists listed here correspond to regulations that apply to hazards found in specific programs. To select checklists from this section:
  - Find the general program area that applies to your program.
  - Identify the individual program name that most closely resembles the one you are looking for. (The exact program names may vary from school to school.)
  - Review the checklists listed underneath the program names to find the ones that you think would apply to your program or course. As a general rule of thumb, use these checklists if the item is used or located in the classroom or if the operation is performed. For example, if the students in the shop, lab, or class within the General Agricultural Business and Management Program operate abrasive wheel machinery, then you would select that checklist.

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Depending on the general program area, there also may be two checklists that apply to all of the specific programs listed. These checklists are: "Personal Protective Equipment" and "Accident Prevention Signs and Tags."

2. Decide which checklists to use. You will probably want to photocopy the appropriate pages of the Vocational-Technical Education Program Index for each classroom or shop. Then use these pages as a worksheet to keep track of which checklists were selected. The categories given on the Vocational-Technical Education Program Index pages are explained below:

- Need? Check this line if the checklist applies. (Note: This category is not given on the career-technical-vocational Career Cluster Program Index page titled "Applicable Checklists--All Programs.")
- Order. If a lot of checklists apply to a shop or classroom, you may want to prioritize the order in which they are to be completed, using "1" to mean "do first," etc. (You may want to do this in consultation with the teacher after he or she has attended the training described in the next section.)
- Date Given. Use this to help you remember when you distributed the checklists. (To establish a realistic timeframe, you may want to do this in consultation with the teacher after he or she has attended the training described in the next section.)
- Date Returned. Use this to indicate when the completed checklists were returned to you. (You may want to pencil in when you expect them back, to trigger you to take follow-up action if needed.)

#### Special Note On Deciding Who Selects The Checklists:

The writers of the Safe Schools Manual originally expected that each teacher would select the checklists that applied to his/her shop or classroom. Pilot-test coordinators preferred to make the initial selection to pass on to teachers instead. You'll have to decide which method will work better at your school. Selecting checklists will be time consuming the first time around. But if you make up master copies of each "package" of checklists that you give out, you won't have to repeat this task in the future. (Just be sure that you add any new applicable checklists that have been developed.)

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3. Look at the checklists you've selected to be sure that they apply to the particular classroom or shop. (You may want to include the teacher in this review.)
4. Adapt the checklists to your setting if you have chosen to do this. You may want to set up committees to do this, or have each teacher do it with your assistance. (See the special note below.)

#### Special Note on the Pros and Cons of Modifying the Checklists:

Some of the teachers at the pilot-test schools were concerned that the checklists were too generic, that a lot of the questions didn't apply to their classroom. However, it was not possible for the Safe Schools writers to develop a detailed checklist for each shop in each school in New Jersey for each applicable regulation. The size of the Manual would have been enormous! Some of the pilot test schools have already established committees to tailor the checklists to their particular needs. Although this will be a time consuming task, it will only have to be done once, with periodic updating as regulations change. Other schools have decided to use the checklists as they are because they thought it was helpful to have a sense of the whole regulation, whether or not all of it applied to them. You may want to try it both ways at your school to determine which method will work best for you.

You may find that a few teachers feel that the checklists are too technical. Keep in mind that the checklists are based on highly technical regulations. Many of the terms used have specific meanings, and if substitute words are used, the meanings may be changed. If you do rewrite parts of checklists, be sure to refer to the definitions at the end of each checklist.

5. Use the Hazard Index to Checklists if you want to find a checklist to evaluate a specific hazard (located at the end of this chapter with a tab labeled Hazard Index). Note that there are no checklists available for certain hazards. This is because there are no regulations applicable to that hazard in the vocational-technical education setting. However, it doesn't mean that the hazard is of no consequence! For example, ergonomics-related injuries, such as carpal tunnel syndrome caused by improper design and use of computer workstations, have become an important occupational disability. However, there are currently no regulations to prevent this problem. If there is no checklist for the hazard you wish to evaluate, contact a representative from one of the regulatory agencies or the Safe Schools Program. They may be able to help you find more information about the hazard. Also look through "Appendix A: Resources" for assistance.

### C. Teacher Training

1. Review, modify as needed, and make copies of the items listed below to hand out during the teacher in-service training. Most of these are located at the end of this chapter in the section tabbed "Training Handouts." You may want to set up a folder or binder for each teacher.
  - a. Sample cover letter to teachers. Rewrite this for your particular school or omit it if you don't think it is necessary.
  - b. Checklist Instructions.
  - c. Common Abbreviations.
  - d. Commonly Asked Questions
  - e. A sample checklist. (To make things easier when photocopying, try to use one that is applicable to all programs. Use this checklist when doing the practice inspection described in numbers 2 and 3 below.)
2. Do a "trial run" of the sample checklist in the classroom, lab, or shop you will use when you train the teachers to ensure you understand the questions.
3. Meet with teachers either individually or hold teacher in-service trainings. The agenda might include:
  - a. Describe the rationale for the checklist program:
    - The checklists can help your school comply with a number of the N.J.A.C. 6A:19-10.2 requirements, in particular the two below:
      1. Conduct "a safety and health hazard analysis for each vocational course and/or program in operation."

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2. Develop "a plan and procedures for periodic inspections and maintenance of facilities, tools, machines, equipment, personal protective devices, hazardous substances, and for the elimination of potential or identified hazards."
  - The checklist program has been incorporated into your school's total efforts to reduce occupational safety and health hazards on the premises.
  - The checklists provide a way to help ensure a classroom environment that minimizes occupational accidents, injuries, and illnesses. (Refer to the introduction in the Safe Schools Manual for more ideas on what to include in your rationale.)
- b. Describe briefly what is in the Safe Schools Manual (optional).
- c. Review the handouts that were copied from the list above, especially the sample checklist. Emphasize that it is important to answer all of the questions, even the ones that don't apply (use the N/A option). Otherwise it will not be possible to tell if the question was overlooked by accident, did not apply, was a "yes" or a "no" answer or the teacher didn't know the answer.
- d. Describe the school's follow-up/remediation procedures.
- e. Do a "practice" inspection using the sample checklist in an actual classroom.

Special Note on the Checklist "Optional Information" Box and Liability:

The purpose of a checklist program is to protect teachers and students by identifying and eliminating environmental, safety and health hazards in classrooms, shops, and labs. You will be able to make a stronger case for an adequate remediation budget if you can document problems in writing and indicate which regulations have not been met. The information from completed checklists will be most useful if the "optional information" box at the top is completed. (This box includes space for the name of your school, date of inspection, the vocational- technical education program/course/room, and signature of the person completing the checklist.) However, you may encounter resistance from some teachers because they are concerned about being held liable for hazards found in their

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classroom or shop if they sign the checklist. In recent law suits around the country, teachers have fared best if they could demonstrate that they documented existing and potential problems and tried to take appropriate actions to correct them. Teachers who took the approach that they didn't know about a problem frequently were not released from liability. The rationale for this was teachers were presumed to be the experts in their field, they should know how to protect the health and safety of themselves and their students in their classrooms, shops, and labs. (In other words, putting one's head in the sand, won't keep one from being considered negligent!) Refer teachers to the discussion on liability and the "Save Harmless" law in the training handout titled "Commonly Asked Questions about the Checklists."

Having the checklists completed by a team, such as members of your school's safety and health committee may be one way to diffuse the liability issue. At a minimum, you should keep track of which checklists are completed by whom for which classroom or shop. Otherwise, depending on the checklist, you won't be able to tell if the checklist was completed for a print shop or an auto-body repair class and therefore won't be able to give accurate direction for remediation and follow-up.

#### Strategies for "Selling" The Checklist Program to Teachers:

Let's face it. Nobody likes to do a lot of extra work, even if it helps us in our jobs. Teachers may need some persuasion to "buy into" the checklist program. The pilot-test coordinators found that it was important to put a good "spin" on the program to get the most cooperation. Here were some of their ideas:

- Use a phased-in approach to keep people from feeling overwhelmed. Distribute checklists piecemeal, perhaps as "the hazard of the week," or in batches over the course of the year. This is especially important for teachers with shops or classrooms having a lot of checklists. (Some potentially could have up to 40!)
- Emphasize that this is a priority of the administration and that problems that are identified will be fixed. (This should definitely be the case if you are taking the time and effort to use the checklists.)
- Emphasize that nobody is penalized for finding problems--this is a proactive way to maintain safety and health in the classroom/shop.

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- Point out that using the checklists will help the teacher look good during regulatory inspections.
- Stress that the checklists are an easy way to determine compliance without having to locate and plow through all the regulations.
- Point out that similar regulations apply to the private sector. Therefore the checklists can help teachers evaluate cooperative experiences (this was found to be the case from the pilot test).
- Keep in mind that the checklists offer the potential for learning more about occupational safety and health. (Some pilot test coordinators felt that "don't know" and "not applicable" answers would be helpful for determining future in-service needs).

D. Dissemination and Use of the Checklists

1. Give each teacher the first batch of checklists to be completed by a specified date. (You can do this during the teacher training.)
2. Have the teachers complete the checklists. They may find it helpful to have you, a safety committee representative, or another teacher accompany them to get an objective perspective.
3. Hand out subsequent "batches" of checklists until all are completed.
4. Arrange for technical assistance if needed. Some of the checklists, such as those pertaining to air contaminant monitoring, may be too hard to complete without outside technical expertise. To identify consultants, refer to "Appendix A: Resources" for ideas.

E. Follow-Up and Record Keeping

1. Meet with the teacher to review the completed checklists and discuss remediation strategies for any identified problems. You may want to include the teacher's supervisor in the meeting.
2. Use the follow-up system that was established in your plan to deal with problems that were identified. (This system should address: who oversees the follow-up and

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monitors the progress of the remediation, the role of the S & H Coordinator and the teacher in the follow-up, budgeting for follow-up, and procedures to follow if no problems are identified. See the sample remediation form letter located in the training handouts section of this chapter. You may want to adapt it to your school.)

3. Check that the remediation was completed and report this information back to the teacher and others who should know. It will be important to the success of the checklist program for people to see that their efforts to find hazards have "paid off."
  4. Keep copies of the completed checklists and memos concerning follow-up procedures. This information will help your school comply with parts of N.J.A.C. 6A:19-10.2 (pertaining to doing "safety and health hazard analysis for each vocational course and/or program in operation" and for carrying out a "plan and procedures for periodic inspections and maintenance of facilities, tools, machines, equipment, personal protective devices, hazardous substances, and for the elimination of potential or identified hazards"). The teacher should also keep copies of checklists and memos pertaining to his/her classroom.
  5. Identify potential in-service topics from issues and questions raised during the use of the checklists and pass this information on to the appropriate people. Use "Appendix A: Resources" for ideas for possible in-service speakers.
- F. Repeating the Cycle
1. Review the checklist program plan and revise as needed. Include in the process the same people who participated in the preparation of the plan.
  2. Establish a time frame for repeating the checklist program. Once a year is probably sufficient, depending on the type of hazards that potentially might be found in a classroom or shop. However, keep in mind that hazardous conditions can crop up unexpectedly, such as when a light switch is removed for repairs and doesn't get reinstalled or when temporary wiring becomes a "permanent" short term solution.
  3. Update checklists as needed. Some regulations may have changed since the checklists were last used. The New Jersey Department of Education, through the NJ Safe Schools Program offers an annual Safe Schools Manual update service. Please contact the NJ Safe Schools Program team at 732-235-9095 or -4988, or by e-mail [cscbre@sph.rutgers.edu](mailto:cscbre@sph.rutgers.edu), for additional information and sign-up for an e-newsletter.

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4. Alert teachers that "it's that time of the year again" and train new teachers as needed before disseminating the checklists.
5. Repeat the process of using the checklists, using the schedule as established previously.

### Case Study

Now that you've read the "blueprint" for a checklist program, you're probably wondering how you would adapt it to your school. Below is a case study describing how staff at the Elizabeth Public School District, in Elizabeth, New Jersey, plan to implement a checklist program. Special thanks are extended to Robert Rossow, Supervisor of Industrial Arts/Vocational Technical Education, for sharing this information for inclusion in the Safe Schools Manual.

### Overview of the Elizabeth Public School District

The Elizabeth Public School District is classified as a comprehensive school district, offering middle and high school industrial arts and vocational/technical courses in 28 program areas. There are approximately 3,400 students in grades 6-8, all of whom are enrolled in industrial arts courses. In grades 9-12, there are 4,400 students, with 800 enrolled in industrial arts courses, and 750 enrolled in vocational/technical programs.

The checklist program will be coordinated by the school's Supervisor of Industrial Arts/Vocational Technical Education. (To be consistent with the terms used in the Safe Schools Manual, this person will be referred to as the S & H Coordinator.) The decision to have a high level administrator take on this task was made to send a clear message to faculty and staff that the district is committed to the program. The S & H Coordinator brings to the position a wealth of experience in vocational-technical education and a demonstrated commitment to safe and healthful classroom environments.

It will be a big job to get the checklist program off the ground because there are 13 buildings to cover and 48 teachers with vocational-technical education responsibilities. Efforts will be made to use existing channels for in-service training, distributing information, etc. Input into the program will come from the newly established district safety committee. This committee will be chaired by the Assistant Superintendent of Secondary Programs. Committee members will include the S & H Coordinator, the Science Coordinator, the Director of Buildings and Grounds, the Supervisor of Custodians, a physical education and health representative, and a school nurse. The district already has a mandated maintenance and repair program to which the checklist program can funnel requests for remediation.

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### Disseminating the Checklists

A special ad-hoc committee will be formed to select checklists for each vocational-technical offering. The committee will be made up of one middle school industrial arts instructor, one high school industrial arts instructor, one vocational-technical education program instructor, and technology instructor, and the S & H Coordinator. They will probably not modify the checklists initially. This will allow teachers to get a sense of what the regulation in the checklist covers even if only a few questions apply to their situation.

Every teacher involved in vocational-technical education, receives an instructional packet made up of a curriculum guide, which included specific safety instructional material for the class, and a district shop safety handbook, that covers safety for all areas of instruction. The following items will be added to the packet: a customized cover letter listing what checklists are enclosed and the timeframe for completing them, the appropriate checklists, training handouts, and a copy of "Appendix B: Using Safe Schools\_to Teach Students About Occupational Safety and Health." (It may be decided at a later date to include other parts of the Safe Schools\_Manual but photocopying costs will be a factor to consider.) The first checklists to be completed will be generic ones, followed by shop-specific ones. The timeframe will be set up so that all of the teachers will complete the same checklists at the same time. For example, within one month, teachers will complete fire safety checklists so service repairs needed in the particular area can be done at once.

The S & H Coordinator will incorporate teacher training into the regular meeting schedule. Strategies for "selling" the checklist program include emphasizing that the checklists will:

- Alert teachers to regulations without having to read them.
- Become an enhancement to the district's safety and health program.
- Provide learning opportunities for students.
- Become part of the district's safety and health manual.
- Help the district comply with new N.J.A.C. 6A:19-10 requirements.
- Teachers will not have to sign their names to the checklists.

The S & H Coordinator will designate a "head teacher" (one with the most experience/seniority) to help facilitate the program at each site. This person would assist in collecting the checklists and be available for answering questions. (This was done because some teachers may feel more comfortable approaching a fellow teacher than the S & H Coordinator because of his administrative position.) The district uses a "buddy system" to match new teachers with experienced ones, and help new teachers complete checklists.

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### Follow-Up Activities

The completed checklists will not be copied to anyone except the S & H Coordinator, who will keep a master file. He will review the checklists and funnel potential violations to the appropriate people, citing the relevant regulation to strengthen his request for action. Emergency situations identified from the checklists will be handled immediately. Building- related problems will be reported to the Building Administrator, with copies of memos sent to the S & H Coordinator. Shop-related problems will be reported to the supervisors. Then the S & H Coordinator will arrange for repairs and relay this information to the building principal and custodians. It is expected that using the checklists will help with budget planning for repairs.