Safety Training Needs Assessment

Role-by-role assessment · Canadian employers

HSE ADVISOR CANADA
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Employer / company: _____ Scope (site / division): _____

Completed by: _____ Position: _____

Date: _____ Review date: _____

1. ROLES AND TASKS IN SCOPE

List every role, then the hazardous tasks it performs. Training follows tasks, not job titles — a supervisor who occasionally operates a forklift needs the forklift training.

ROLE / JOB TITLE	HEADCOUNT	HAZARDOUS TASKS PERFORMED	EQUIPMENT OPERATED

2. SORT THE TRAINING INTO THREE BUCKETS

BUCKET	WHAT BELONGS HERE	HOW IT IS PRIORITISED
A — Legally required	Training a regulation names explicitly for this work in your jurisdiction, with a defined validity period.	Not negotiable. Expiry dates set the schedule.
B — Competency required	Training needed to do the task safely, where the regulation requires competence but does not name a course.	Ranked by the risk of the task it covers.
C — Discretionary	Training that improves capability or culture but is not required to work safely today.	Competes on value. Cut first when budget is tight.

Do not guess which bucket something is in. Requirements differ by province and by sector, and calling a legally required course "discretionary" is how employers end up with an order. Verify against the regulation that applies to you.

3. TRAINING MATRIX

One row per training requirement. Mark each role R (required), D (desirable) or – (not applicable). The first three rows are Ontario examples; replace them with the requirements that apply to you. Sources: O. Reg. 297/13, Reg. 860, OHSA.

TRAINING	BUCKET (A/B/C)	REGULATION OR BASIS	VALIDITY PERIOD	ROLES REQUIRING IT	PROVIDER
Working at heights (Ontario construction)	A	O. Reg. 297/13, ss. 6–8	3 years from completion		
Worker OHS awareness (Ontario)	A	O. Reg. 297/13, s. 1	Once; no renewal period		
WHMIS worker education (Ontario)	A	Reg. 860, s. 7; OHSA s. 42(3)	No fixed period; review at least annually		

4. CURRENT STATE AND GAP

TRAINING	REQUIRED (N)	CURRENT (N)	EXPIRING IN 90 DAYS	GAP (N)	PRIORITY

> Count "current" only where you hold a dated record. Training a worker attended but that was never recorded does not exist as far as an inspector or auditor is concerned.

5. DELIVERY METHOD — MATCH THE METHOD TO THE OUTCOME

METHOD	WORKS WELL FOR	WEAK FOR
Online / self-paced	Knowledge, awareness, regulatory content, refreshers, distributed workforces.	Anything needing hands-on skill or observed competency.
Instructor-led classroom	Discussion, judgement, scenario work, questions specific to your site.	Scheduling across shifts; cost per head.
Practical / hands-on	Equipment operation, rescue, fit testing, anything with a physical skill.	Knowledge-heavy content; scaling.
On-the-job coaching	Site-specific application and reinforcement.	Consistency, and proving what was covered.
Toolbox talk	Short reinforcement, current hazards, post-incident learning.	Standing in for real training. It does not.

6. VERIFY IT WORKED

REQUIREMENT	WHAT GOOD LOOKS LIKE	Y / N / N-A	EVIDENCE OR GAP
Knowledge checked	Assessment at the end of training, with a pass standard.		
Skill observed	For practical training, competency observed and signed off by a qualified assessor.		
Applied on the job	Supervisor confirms the behaviour on the floor after training.		
Records complete	Worker name, content, date, trainer, expiry — retrievable on request.		
Refresher tracked	Expiry dates monitored with advance notice, not discovered at audit.		
Effectiveness reviewed	Incident and observation data reviewed for whether the training changed anything.		

7. PLAN AND SIGN-OFF

PRIORITY	TRAINING	WHO	METHOD	TARGET DATE	BUDGET

COMPLETED BY

DATE

APPROVED BY (MANAGEMENT)

DATE

Want help applying this?

Our consultants (CRSP Certified · COR & ISO 45001 Lead Auditors) can adapt this to your workplace or review your safety program with you.

(647) 620-5278 · **info@hseadvisor.ca** · **hseadvisor.ca/contact**

Safety Training Needs Assessment Template · Version 1.1 · Reviewed October 2026 · HSE Advisor Canada. Free to use and adapt. General guidance, not legal advice.

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