CALGARY SAFETY CONSULTANTS

Training Needs Assessment Worksheet

One worksheet per role or position

How to use this worksheet

Complete one worksheet for each role or position in your company. Work through Parts A to G in order: describe the role, list its tasks and hazards from your hazard assessments, identify the training the law, your program and your clients require, decide how competency will be verified, record the gaps and a dated plan, and record the competency assessments. Transfer the results to your training matrix. Fill it in on screen or print it.

- **Start from the work, not a course list.** Every training requirement should trace back to a task, a hazard or a legal rule.
- **Separate attendance from competency.** A certificate shows a course was completed. Part E records how you'll confirm the worker can do the task.
- **Use confirmed refresher periods only.** Use the law, the date on the certificate or a documented company interval (see the reference on page 5).
- **Involve the people who know the job.** Complete it with the supervisor and an experienced worker, and with your joint committee or representative where you have one.

Key terms

Term	What it means
Training matrix	A grid of roles against required training, with each worker's completion dates, expiry dates and status.
Competent	Alberta's OHS Act: adequately qualified, suitably trained and with sufficient experience to safely perform work without supervision or with only a minimal degree of supervision. Definitions differ by jurisdiction.
Competency verification	A documented check that the worker can do the task safely: an observed task, practical demonstration or scenario questions, with assessor, date and result.
Legal training	Training a statute, regulation or code requires for the work (for example WHMIS, first aid attendants, TDG, fall protection).
Program training	Training your own health and safety program requires (for example orientation, hazard assessment, safe work procedures, emergency roles).
Refresher period	How long training stays valid before it must be repeated: set by law, printed on the certificate, or decided by the company.

Part A: Role details

Role or position

Department / site

Date

Completed by

Supervisor consulted

Worker or committee member consulted

Hazard assessment / JHA references

Number of workers in this role

Jurisdiction(s)

This role (tick all that apply)

- ☐ Provincially regulated
- ☐ Federally regulated (Canada Labour Code)
- ☐ Works at client sites
- ☐ Works alone at times
- ☐ Supervises others
- ☐ Drives for work
- ☐ Handles or ships dangerous goods
- ☐ Young or new workers in this role

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Short description of the role

Part B: Tasks and hazards

List the main tasks from your hazard assessments and JHAs. Tick High risk where a mistake could cause serious injury; those tasks need training before the worker starts them and a competency check.

Task	Main hazards	HA / JHA ref.	How often	Equipment or products used	High risk
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

Part C: Legal training required

Tick each type of training the law requires for this role, then list the specific courses in the table. Check the regulation for your jurisdiction and the hazards in Part B.

Legal training types for this role

- ☐ Orientation (new or transferred)
- ☐ TDG certificate
- ☐ Lockout / hazardous energy
- ☐ Respiratory protection and fit
- ☐ Working alone procedures
- ☐ WHMIS
- ☐ Fall protection / working at heights
- ☐ Powered mobile equipment
- ☐ Supervisor or legislation training
- ☐ Violence and harassment
- ☐ First aid (designated attendant)
- ☐ Confined space
- ☐ Cranes, hoists or rigging
- ☐ Committee or representative
- ☐ Other (list below)

Course, ticket or certificate	Legal source (Act, regulation, section)	Refresher period	Source of period	Before task	Practical check
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

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Course, ticket or certificate	Legal source (Act, regulation, section)	Refresher period	Source of period	Before task	Practical check
				☐	☐
				☐	☐
				☐	☐

Jurisdiction notes: the duty to train

Jurisdiction	Key training and competency rules (summary only; check the full text)
Federal	Canada Labour Code s. 125(1)(q) information, instruction, training and supervision; s. 125(1)(z) supervisors and managers adequately trained.
Alberta	OHS Act s. 3(2) adequate training; s. 3(3) endangering work by a competent worker or under direct supervision of one; s. 1(d) defines competent; s. 5(1)(f) workers take part in training.
British Columbia	Workers Compensation Act s. 21(2)(e); OHS Regulation s. 3.23 orientation before a young or new worker starts, s. 3.24 more training if observation shows they can't work safely, s. 3.25 records.
Saskatchewan	OHS Regulations, 2020, s. 3-8: training on starting work or moving to work with different hazards; work only if trained and experienced, or under close and competent supervision.
Manitoba	Act s. 4(2)(b); Regulation s. 1.1 defines competent; s. 2.2.1 workplace-specific orientation for new workers before they begin, with records.
Ontario	OHSA cl. 25(2)(a) instruct, inform and supervise; O. Reg. 297/13 awareness training for workers and supervisors; working at heights training for construction workers using fall protection.
Quebec	Act respecting occupational health and safety s. 51(9): training, assistance or supervision so the worker has the skill and knowledge to work safely.
Atlantic provinces	NB OHS Act s. 9(2)(c) to (c.4); NS employers provide safety instruction and job training; PEI OHS Act s. 12(1)(c); NL OHS Act s. 5(b).
Territories	Yukon Code of Practice 2022-04 (young and new workers); NWT and Nunavut: supervisors attend an approved familiarization course, competency documented for each worker and task.

Part D: Program and client training

Program and client training types

- ☐ Company orientation
- ☐ Site-specific orientation
- ☐ Hazard assessment (FLHA, JHA)
- ☐ Safe work procedures for the role
- ☐ Emergency response role
- ☐ Incident investigation
- ☐ Inspections
- ☐ PPE use and care
- ☐ H2S awareness or H2S Alive
- ☐ Ground disturbance
- ☐ Client-specific orientation
- ☐ Other (list below)

Course or topic	Why it's needed (program, client, contract)	Refresher period	Required or recommended	Practical check
				☐
				☐
				☐
				☐
				☐

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Course or topic	Why it's needed (program, client, contract)	Refresher period	Required or recommended	Practical check
				☐
				☐

Part E: Competency verification

For each high-risk task and each course needing a practical check, set out what a competent worker must be able to do, how you'll check it and who can assess. Until a worker has been assessed, they should do the task only under the direct supervision of a competent worker.

Task or course	What the worker must show (criteria)	Method	Qualified assessor	Reassess when

Methods this role will use

- ☐ Observed task
- ☐ Practical demonstration
- ☐ Scenario questions
- ☐ Written test
- ☐ Oral questions
- ☐ Review of past work or tickets

Reassessment triggers for this role

- ☐ New equipment or procedure
- ☐ New hazard or site
- ☐ Long absence
- ☐ Incident or near miss
- ☐ Inspection finding
- ☐ Observed shortcuts

ESC COR audit link. Energy Safety Canada's 2023 COR audit protocol describes competency as the combined knowledge, skills and sufficient experience to perform a task with little or no supervision, and asks whether job-specific training includes a practical demonstration by the trainee.

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Part F: Gaps and training plan

Compare what the role needs with what each worker in it has. Fix missing legal training for current work first (move the worker off the task until trained; use direct competent supervision only where the rule allows it), then expired, then expiring, then missing competency checks, then program and recommended training.

Worker	Training or check missing	Gap type	Action and interim control	Owner	Due	Done
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐

Gap summary for this role

☐ Missing ☐ Expired ☐ Expiring soon

☐ Competency not verified ☐ Record or certificate missing ☐ Interim supervision (where the rule allows)

Reference: refresher periods confirmed from official sources

Training	Validity or refresher	Source
Workplace first aid (Alberta)	Valid for up to 3 years; recertify before expiry or take the full course after	Government of Alberta, First aid training
Workplace first aid (B.C.)	All certificates valid for three years	WorkSafeBC, Get or renew workplace first aid
TDG training certificate	Expires 36 months after issue (road, rail, marine); 24 months (air). Employer issues it (self-employed persons issue their own). Keep records until 2 years after expiry	Transport Canada, TDG Bulletin: TDG Training
Working at heights (Ontario construction)	Valid for 3 years; refresher from an approved provider	Government of Ontario, Training for working at heights
Fall protection (Alberta)	No refresher required by Alberta legislation; set a company interval	Government of Alberta bulletin IJR001 (2026)
WHMIS (B.C.)	No card expiry; WHMIS program including education reviewed at least annually	WorkSafeBC OHS Regulation s. 5.5
Energy Safety Canada courses	In-class certificates show an expiration date; online course certificates don't	Energy Safety Canada, Certificates

Other tickets often carry provider or client expiry dates. Record the date on the certificate and any company interval, and note the source on your matrix.

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Worked example: equipment operator (illustrative)

Part	Example entry
A. Role	Equipment operator, field crews, 6 workers. Alberta. Works at client sites; drives for work.
B. Tasks	Operate loader and skid steer (struck-by, rollover; high risk); pre-use inspection; refuel equipment (fire, spills); work near excavations (cave-in).
C. Legal	WHMIS (fuel, lubricants); powered mobile equipment training for each machine; first aid for the designated attendant on the crew; fall protection when accessing machine tops where required.
D. Program	Company and site orientation; FLHA and JHA training; safe work procedures for refuelling; emergency role on the spill response team; client orientation.
E. Competency	Observed operation of each machine against a checklist by the lead hand; practical pre-use inspection; scenario questions on refuelling spills. Reassess after 6 months off the machine or any incident.
F. Gaps	Two operators not yet assessed on the new skid steer: assessment booked within 2 weeks, direct supervision until then. One first aid certificate expiring in 45 days: refresher booked.

Common mistakes to avoid

- ☐ Building the list from available courses instead of the role's tasks and hazards.
- ☐ Treating a certificate or sign-in sheet as proof the worker can do the task.
- ☐ Guessing refresher periods instead of using the law, the certificate date or a documented company interval.
- ☐ Forgetting supervisors, office staff, drivers, transfers and workers returning from long absences.
- ☐ Letting workers start high-risk tasks before the required training and assessment are done.
- ☐ Not updating the worksheet when equipment, procedures, sites or clients change.

Review checklist before you sign

- ☐ Every task in Part B traces to a hazard assessment or JHA.
- ☐ Each legal requirement in Part C names its source and refresher period.
- ☐ Every high-risk task has a competency method, criteria and qualified assessor in Part E.
- ☐ Each gap in Part F has an owner, a due date and an interim control.
- ☐ Results have been transferred to the training matrix and course catalogue.
- ☐ The worksheet has a review date (at least yearly, and whenever the role changes).

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Part G: Competency assessment record

Record each practical assessment for workers in this role. Tick Competent only when the worker met every criterion in Part E; otherwise tick Needs coaching, keep the worker under direct supervision for that task and set a reassessment date. Copy the result to the training matrix.

Worker	Task or equipment	Method	Assessor	Date	Competent	Needs coaching	Reassess by
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	

Sign-off

Prepared by	Signature	Date

Reviewed by (manager)	Signature	Date

Committee or representative review	Signature	Next review date

Want help? Calgary Safety Consultants helps employers build training matrices, competency assessments and audit-ready training records. Call 1-888-231-0358 or visit calgarysafetyconsultants.ca. Free guide and Excel training matrix: calgarysafetyconsultants.ca/safety-guides/safety-programs/safety-training-matrix/.

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