

# Fixing the Competency Gap Before It Led to an Incident

How a manufacturing company used OHS Insider to verify whether workers were trained, qualified and ready for high-risk work

## Case Story

**...everyone believed the experienced workers knew what they were doing.**

At Iron Valley Components, everyone believed the experienced workers knew what they were doing.

Most of them did.

That was what made the issue so difficult.

The company manufactured custom metal parts for industrial clients. The work involved overhead cranes, powered mobile equipment, welding, machine guarding, lockout, hazardous materials and maintenance tasks that required more than general safety awareness. Workers needed training, experience, supervision and task-specific knowledge.

For years, the company relied heavily on informal confidence.

A supervisor would say, "He's been doing this for years."

A lead hand would say, "She knows the machine better than anyone."

A worker would say, "I was trained on that a long time ago."

The safety coordinator, Nathan, respected the experience on the floor. But after a serious near miss involving a hoist, he realized experience alone was not enough. The worker involved had operated similar equipment before, but not that specific hoist, not with that load configuration, and not under the conditions present that day.

The worker was capable.

The company just couldn't prove he was competent for that task.

That distinction mattered.

**OHS Insider helped Nathan turn that concern into a structured competency audit.**

## Moving beyond attendance records

Nathan started by reviewing OHS Insider resources on competent and qualified worker requirements. He quickly saw that the company's training records told only part of the story. A sign-in sheet showed that someone attended training. It did not show whether the person understood the hazards, could apply the procedure, had enough supervised experience or was authorized to perform the task independently.

That was the gap.

Nathan created a list of safety-sensitive tasks across the plant. It included crane operation, forklift use, lockout, confined space support work, hot work, machine setup, chemical handling and maintenance on energized or potentially energized equipment.

## Helping supervisors verify competence

The most important change was not the matrix itself. It was the conversation it forced with supervisors.

Nathan met with each department lead and asked a simple question: "How do you know this person is competent to do this task?"

At first, the answers were vague.

"He's done it before."

"She's one of our best people."

"They were trained by the previous supervisor."

Nathan didn't dismiss those answers. He built on them. If a worker had experience, they

Then he used OHS Insider tools to build a competency matrix. Each task required evidence in several areas: training completed, procedure reviewed, knowledge verified, practical ability observed, supervisor sign-off and refresher date.

The exercise exposed several weaknesses.

Some workers had general training but no task-specific sign-off. Some had been trained on older equipment but not newer machines. Some supervisors had verbally approved workers for tasks without documenting the basis for that decision. In a few cases, the company could not clearly distinguish between a worker who had received awareness training and a worker who was qualified to perform higher-risk work.

Nathan did not present the findings as a failure.

He presented them as exposure.

That made leadership listen.

documented it. If a supervisor had observed the work, they recorded the observation. If a worker needed a refresher, they scheduled it. If a task required a higher standard, they identified the additional credential or certification.

One supervisor, Glen, resisted at first. He had been in manufacturing for 28 years and didn't like the idea of reducing worker ability to a form. But during the audit, he discovered that two newer workers had been helping with equipment adjustments without clear lockout authorization. They weren't careless. They were following what they thought was normal practice.

That changed his view.

The form wasn't bureaucracy. It was a way to catch assumptions before they became incidents.

## The key successes

Within four months, Iron Valley Components had completed a competency review for its highest-risk tasks and created a clearer process for authorizing workers.

The company identified workers who needed refresher training, updated task-specific procedures and created a supervisor sign-off process for practical competency. It also clarified which tasks required general training, which required demonstrated competence and which required a qualified person with specific credentials.

The biggest gain was control.

Nathan no longer had to rely on scattered records and verbal assurances. Supervisors had a consistent process for verifying worker readiness. Workers understood that being assigned to a task required more than having “done it before.”

The company also improved its inspection readiness. If an inspector asked who was authorized to operate a crane, perform lockout or handle hazardous substances, Nathan could produce a more complete answer.

Not just a name.

A record.

## From assumed competence to verified readiness

Iron Valley still valued experience. It simply stopped treating experience as a substitute for proof.

OHS Insider helped the company translate legal and compliance expectations into a practical workplace system. It gave Nathan the language, tools and structure to explain why competency had to be verified, not assumed.

That helped the company protect workers, supervisors and the business.

For Nathan, the value of OHS Insider was not just that it answered a compliance question. It helped him find a hidden weakness in the safety program before an injury, order or fine forced the issue.

The near miss was the warning.

OHS Insider helped turn it into prevention.

## Key Results

- Created a competency matrix for high-risk and safety-sensitive tasks
- Identified gaps between general training and task-specific authorization
- Improved supervisor sign-off and practical verification
- Scheduled targeted refreshers before gaps became enforcement issues
- Strengthened inspection-ready documentation for competent and qualified worker requirements

**Training records are only part of the story. OHS Insider helps you prove workers are ready for the work they're assigned.**

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