



## Annual Report 2020

for 1 April 2019 – 31 March 2020 Financial Year

*The Human Factors and Ergonomics Society of New Zealand is the professional membership body for human factors/ergonomics professionals in New Zealand. The HFESNZ has functioned since 1986, after splitting from the Ergonomics Society of Australia and New Zealand established in 1966. Thus, we have had a NZ society for this professional group for 54 years.*

*The society objectives are to promote the application of human factors/ergonomics knowledge; and advance human factors/ergonomics research, education, public awareness, and professional standards. HFESNZ is a federated member of the International Ergonomics Association.*

### Key achievements

- The society continues to grow in membership – from 90 at the start of the financial year in 2019, to 103 in mid-June 2020.
- The Professional Affairs Board met 5 times, receiving and processing 5 successful Professional Member applications and 5 Re-certifications for Certified Members.
- Professional Member numbers increased from 19 to 22.
- We continue to have 5 Certified Members listed on the HASANZ Register.
- One member received a HASANZ scholarship for commencing an HFE PhD.
- We have progressively overhauled our administrative systems and we welcomed Carole Unkovich to the team as Administrator in December. We now have a new mail system, Office 365 platform, and Xero for financial records, with an upgrade to the membership database expected before the end of 2020.
- We held 7 committee meetings.
- In August 2019 we held the Human Factors in Healthcare symposium at Auckland DHB led by Fiona Trevelyan, leader of the Healthcare special interest group, with ACC Sponsorship and two overseas expert key-note speakers
- Immediately after the Healthcare symposium we held the Bi-annual HFESNZ Conference in Central Auckland, with significant effort from Hannah Trevett, Lily Hirsch, myself and others.

- The Covid-19 global pandemic has impacted on everyone. The knock-ons include the need for this essentially virtual AGM and has seen the planned 2020 HASANZ Conference moved to 2021, and our own September mini-conference remain ‘up in the air’ at this time.
- At the conference we launched our Plan on a Page, a 1-page summary of the key areas of focus for the Society over the next year or two.
- We established the Transport Interest Group and had a first meeting at the annual conference, with follow up communication about areas of focus
- A Musculoskeletal Interest Group has also been established, led by Marion Edwin.
- A subset of members is participating in ACC-funded professional development, to assist with DHB adverse event reviews. There have been a number of workshops, meetings, and webinars with this group over the past year.
- Our HASANZ Representative, Marion Edwin, attended six HASANZ Governance Group meetings, and many other Operations and Finance, Membership, and Register sub-committee meetings.
- We have communicated regularly with members – having sent out regular ‘HFE-News’ newsletters and many email communications
- Grown our links and reach with other government and professional bodies through HASANZ and consistent outreach and networking activities. In particular good Society/Govt agency awareness is developing through WorkSafe and the NZ Transport Agency
- A funding proposal was submitted in May 2020 to WorkSafe for NZ Human Factors/Ergonomics Workforce Development, following the November 2019 HASANZ ‘Building the Professions’ report. We await the outcome from the Workforce Development Proposal.
- Our financial position is strong thanks to the Healthcare symposium and Bi-annual conference income, along with more proactive retention of members and membership growth.

All in all, a very productive year, and good HFESNZ progress in New Zealand. But there is much more to do!

## **Chairperson’s Report**

### *Reflections on the year*

Thanks to the Committee and the Professional Affairs Board teams for all your work over the past year. We continue to make headway in raising the profile of HFE in New Zealand, thanks to many activities that have been delivered, but there is always so much more to do. Some notable efforts included the Conference planning from Hannah, Leadership and planning for the Healthcare Symposium from Fiona, and representation at HASANZ meetings, PAB leadership, and leading the workforce development work from Marion. It was also great to have Liam Kettle, post-graduate student from Otago compiling the HFE News for us, and thanks to member Jennifer Orman for her writing help with the workforce development proposal. We’ve got a strong committee, and also now committee members who have roles with government agencies including Maggie/Jo with Waka Kotahi NZ Transport Agency and Dave Moore with WorkSafe. While these aren’t official connections, it still provides a useful link to help raise Society profile within Government. Mark Boocock is stepping down from the Committee and we thank him for his earlier treasurer role and for setting up the webinars.

Kim Pearson, our administrator left late last year to consolidate her various admin roles with other societies, and Carole Unkovich started with us. Carole has been instrumental in helping to get administrative systems set up, which are needed with our growth, but also as we strive to reduce the burden on the committee who are all volunteers. It's taken a while for me to get familiar with all the systems and things that need to be done to maintain and advance the Society, but I feel that we are now getting back to a smoothly running team, and so we can start to made headway with our goals.

The double header of the Human Factors in Healthcare Symposium and our Bi-annual conference was the highlight of the year. It was a real breakthrough to see around 80 or so DHB personnel, govt reps, and HFE specialists come together for a very informative and collaborative Symposium. HFE folks got a real taste of the day to day challenges faced by those working in DHBs and healthcare professionals soaked up the HFE knowledge from our two UK based HFE/Healthcare experts Alexandra Lang and Saskia Fursland. The conference was also a chance to make strong connections with government, and there are now good links being made in the Health and Safety and Transport areas.

A rather sad end to the year was the passing of member Peter Turner, in October. A long-time member of the Society, Peter was a Society stalwart who was always supportive of society activities, and our first Technical Professional Member.

Although happening mostly after our last financial year, the COVID-19 global pandemic has had an impact on most areas of life and it has made trying to progress Society events and activities difficult, as many people have needed to focus on family and work in an attempt to keep things on an even keel or even afloat. By now we would have hoped to have had one or two 'face to face' Society events, even if small, but the lockdown has made this impossible.

However, with most people's contact being dominated by Zoom, there have been some useful initiatives such as 'Working Productively from Home' webinars arranged by Sue and Marion for the wider audience of HASANZ and to our occupational hygiene colleagues; and our occupational hygiene colleagues Lucre Pfefferman and Carl Goodhue presented to us about Covid-19 risks and management. Whilst many events were cancelled, some members also made the most of virtual attendance at international conferences, symposia, and webinars – an unexpected accessibility opportunity resulting from the pandemic.

New Zealand is in a good place, but there will still be disruptions to work and other events as we know it. Our challenge for the remainder of the year will be to organise Society events that bring opportunity and value to members and others that we work with.

### *Looking forwards*

Our Plan on a Page sets out the areas we need to continue to focus on:

- Competency for new and existing members
- Professional value for members
- Connecting with Government, industry, the health and safety sector and other related areas
- Focusing on specific areas of expertise
- Working efficiently and working with others

I feel that we have made some real headway on the first four points over the past year, but of course there is much more to be done. We do need to continue to strive for efficient processes that advance the Society, but don't unduly burden the volunteers that have put their hand up to 'take the

baton' and do their bit for the Society and HFE in general. It is important that we all reflect on why the HFESNZ exists, what we want it to achieve, and how we can all play our part to get the most out of it. Like many societies and largely volunteer organisations a disproportionate amount of effort sits with too few, and we do need to think about how we can spread the load, so that we can advance the Society's goals. We need to acknowledge the huge amount of work that Marion has put into the Society over the years, but at the same time, we do need to share the tasks so that individuals don't have to do so much.

But all up it's an exciting time for HFE and the HFESNZ. It seems like the world is 'getting on board' with many of the principles that HFE stands for. For example, seeing government departments insist on systems thinking instead of focusing on individuals to keep themselves safe, is like the dawning of a new era!

I look forward to working with you all over the next year.

Hamish Mackie

### **HASANZ Report (Marion Edwin)**

Marion has continued as HFESNZ Representative on the governance team for HASANZ - the Health and Safety Association of New Zealand. HASANZ is the umbrella organisation representing all disciplines working in workplace health and safety, formed in 2014 following the Pike River mine tragedy and the consequent Independent Taskforce on Workplace Health and Safety (2012) review. HASANZ now operates a Register (live since mid-2018) of qualified health and safety professionals from all disciplines.

#### *HASANZ Register*

Certified Professional Members of HFESNZ are currently able to list on this searchable Register. We still have only five HFE professionals listed but with some search function problems that have impacted our findability, we have not pushed the HASANZ Register to members. Work over recent months means that by the time of AGM it is hoped that these search issues are fully resolved – they were varied and complex, requiring many hours of background work to fix. It remains important that businesses seek recognised professionals for human factors/ergonomics work and the society continues to support the growth of professional member numbers.

#### *Activities*

In addition to the Governance Group work for HASANZ, requiring attendance at six one day meetings, Marion has held a number of internal roles within HASANZ:

- As Secretary she sits on the Operations and Finance Sub-committee, and has attended four Zoom meetings during the 2019-2020 financial year.
- As HFESNZ representative (linked to the PAB role) she sits on the Register Working Group Meetings, and has attended two meetings via Zoom, and one full day/overnight workshop (Christchurch) on the combined professions Competence Framework that informs the HASANZ Register.
- As a member of the HASANZ Membership Committee she attended one meeting to assess another society's application to join HASANZ. These meetings occur intermittently and will be with decreasing frequency as most relevant bodies have now joined or are in the process of joining HASANZ.

The society HASANZ representative receives an honorarium of \$500 per day (inclusive GST) from HFESNZ for participating in the (Wellington) Governance meetings, paid on invoice. Travel costs are funded via HASANZ for Governance Group meetings, also paid on invoice. No other HASANZ related meetings are funded, with exceptions noted following. HASANZ covered the expenses associated with the Competence Framework workshop.

The time commitments and funding arrangements are reported for transparency. All meetings require preparation time in addition to the time being present. Multiple other phone calls and discussions are necessary to continue the work of HASANZ between formal meeting dates, with some other projects coming up from time to time. For example, a key activity during 2019 was the preparation of the HASANZ 'Building the Professions' report (November). The preparatory workload for this project was shared between Marion Edwin and Dave Moore (linked with their PAB roles and experience), with several face-face and virtual meetings occurring. For this work, travel costs were covered by HASANZ, and a low hourly rate (\$62.50 per hour) was also paid for Marion and Dave's time. Other HASANZ related activities will require support and engagement from other HFESNZ members from time to time. This is important to increase our combined ability to speak to the issues of relevance for the profession, with good knowledge of the back stories. For example Liz Ashby (a PAB Assessor) also attended the HASANZ meeting that launched the 'Building the Professions' Report (November) that identifies barriers in the supply of qualified professionals throughout all health and safety disciplines; and Hamish Mackie as Chairperson attended one Governance meeting as an observer, and the 2019 AGM.

#### *Workforce Development*

Importantly for HFE, the 'Building the Professions' report highlighted the incomplete range of HFE education currently available in New Zealand. The important next step for the society was to prepare a proposal document to outline steps to address and mitigate the identified barriers. Proposal preparation was commenced by Marion in early 2020 with support from members Liz Ashby, Hamish Mackie, and Jennifer Ormsby (with a little help from the Covid-19 enforced 'sabbatical'). Education stakeholders, PAB, committee, and members were engaged with, and the final HFESNZ Workforce Development Proposal, representing many weeks of combined effort, was presented by HASANZ and HFESNZ to WorkSafe on 7 May. We await a formal response to this proposal.

#### *Related projects*

Some other work via HASANZ occurred in relation to musculoskeletal injury prevention and strategy development activities, funded by ACC via HASANZ. Associated with the HFESNZ representation role, the disciplines that usually engage with prevention or management of musculoskeletal disorders were asked to join a sub-group to meet with ACC for a project that was initially 'sold' to us as musculoskeletal harm prevention strategy development exercise. The sub-group was made up of HFE, occupational health nursing, physiotherapy, and occupational therapy representatives, and representatives were paid an hourly rate for their time (\$118.75). Whilst initially sold to us as a strategic piece, it unfortunately developed into a much less satisfactory activity involving the trial of a manual handling assessment and intervention tool. This did not fit within our knowledge of good practice and caused significant and growing concern for the recognition and management of musculoskeletal harm by WorkSafe and ACC. We felt that ACC's direction had inadequate intelligence, lacked internal capability and expertise, and lacked agency linking and connection with legislative requirements - and we supported a redirection of effort. We are happy to see that WorkSafe is now picking up the baton to lead around musculoskeletal harm prevention activities, in

association with psychosocial harm and good work design initiatives. Greater transparency within HASANZ processes to take on projects and select professionals to do the related work tasks has also been highlighted.

#### *HASANZ future*

As an organisation, it is clear that HASANZ has gained respect within the government agencies addressing health and safety across various industry sectors, led by WorkSafe. HASANZ is becoming increasingly important in the drive to embed excellence in health and safety knowledge and action into the working models of all NZ agencies and businesses. Work is being done around the funding model for HASANZ, with a focus on central funding - instead of needing to bid for projects with inbuilt project management fees in order to remain financially viable. HASANZ has been financially challenged by the Covid-19 related postponement of the conference from September 2020 to September 2021, but not insurmountably. It is clear that HASANZ is here to stay and has an important set of goals.

Marion Edwin, 15 June 2020

### **Professional Affairs Board Report (Marion Edwin)**

#### *Membership numbers*

We continue to experience steady membership growth (totalling 41% growth over the last 5 years), including growth in Professional Member numbers (64% growth over the last 5 years). We encourage General Members to look into the requirements for Professional Membership, and to consider working towards recognition of skills in the field of HFE.

<b>Membership category</b>	<b>15 June 2020</b>	<b>31 March 2019</b>	<b>31 March 2018</b>	<b>31 March 2017</b>	<b>31 March 2016</b>
<b>Certified Prof Member</b>	15	14	14	9	8
<b>Associate Prof Member</b>	7	4	3	4	6
<b>Technical Prof Member</b>	1	1	1	0	0
<b>General Member</b>	65	57	56	64	51
<b>General Member (Life)</b>	7	11	8	8	8
<b>Student Member</b>	6	3	2	0	0
<b>Total</b>	103	90	84	85	73

#### *The PAB team*

I thank PAB Assessors Richard Parker, Liz Ashby, and Sue Alexander for their continued efforts in this role and consistent support of the profession. In order to ensure that we bring through and train up others to these assessment roles, Richard Parker is stepping down from the PAB, and we seek another Certified Professional Member to take this position. At the next AGM we will likely require several newcomers to the PAB as the current assessors, and myself as convenor, will have reached the end of our 2 year terms (and we have all done previous stints in the role).

#### *Activities*

Professional member assessments - The PAB held 5 meetings during the 2019/2020 financial year. Assessments were completed for 5 successful Professional Member applications, 5 recertifications for Certified members, and 4 other assessments (as yet incomplete/unsuccessful/for guidance on education programme/revert Certified to Associate/HASANZ Register reviews).

CPD Proposal - The PAB has also been working on a proposal for all Professional Members to complete continuing professional development (CPD) activities to maintain and grow their professional expertise. Currently it is only Certified Professional Members that are required to maintain professional currency – via the three yearly recertification process. The addition of a CPD requirement for Technical and Associate members will pave the way for the inclusion of Technical and Associate members for listing on the HASANZ Register. It is this lack of CPD which is the key reason that they do not yet qualify for this.

HASANZ Register - The PAB Convenor is engaged with the HASANZ Register Committee – a part of HASANZ - with important activities regarding the HFE Competencies that sit as part of the Register. HFESNZ member claims for their HASANZ Register listing are reviewed, and gate keeping occurs for members of other societies that may claim to have competence within the HFE field. These HASANZ Register discussions have proved to be both challenging and fruitful – as each profession and applicant works through where their boundaries for practice are. Never easy when many expect to be able to claim human factors or ergonomics competencies when they only have introductory level knowledge – rest assured we keep the bar high.

Workforce Development - Associated with the HASANZ ‘Building the Professions’ report and our subsequent HFESNZ Workforce Development Proposal, the PAB hopes to receive and looks forward to funding support that will enable specific HFE profession development activities. An HFE Competency Framework review will be followed by work to develop educational programmes, mentoring, scholarships, HFE awareness-raising, career development material and other activities - as outlined in the proposal document. These activities will be critical for strengthening the discipline of HFE in New Zealand and embedding our positions within organisations into the future.

IEA Certification Programme Endorsement – Renewal Application - The HFESNZ’s certification processes were endorsed by the International Ergonomics Association (IEA) in 2007, when operating under the then Board for Certification of NZ Ergonomists (BCNZE). The IEA’s certification committee has requested that HFESNZ submit an application to renew the status of this certification endorsement. This will provide a useful audit of our PAB processes following the society refresh activities of the last decade (the change from NZES to HFESNZ in 2012, with subsequent re-branding, and Rules revision in 2015). These developments have seen some alteration of PAB and Professional Membership processes, so it is timely to review these - particularly in light of the work of HASANZ to promote the work of all the health and safety disciplines. Marion has commenced work on this application for renewal of the IEA certification endorsement. Potential system changes associated with the proposed Workforce Development activities (particularly the competence framework review) will also impact on the PAB processes and systems.

Marion Edwin, 15 June 2020