



Review Health and Safety Performances, Not Just the Results

by Jonathan Jacobi

American baseball legend Yogi Berra said, “If you don’t know where you are going, you will wind up somewhere else.” Yogi was a smart man: successful companies set goals, measure their progress toward goals, and know when to correct course if they get off track. Performance measurement also helps identify best practices and can promote a positive culture by giving credit when it’s due.

Recognize achievement

People exceed expectations when they think work will be recognized. It’s basic human nature to seek approval. Without something positive at stake, measurement systems can look like a micromanagement tactic to squeeze additional performance from an already overworked and weary workforce. Appropriate reward and recognition systems can be a good motivator toward safer practices.

Balance your scorecard and bias measures toward activities

Top managers judge business results with metrics reflecting achievement rather than negative metrics reflecting failure (e.g. units not sold). Contrary to reason, many of these same managers obsess over failure rates to gauge safety management. The number of accidents CANNOT be directly managed.

Companies should measure activities performed to achieve safety goals. To illustrate this point, let’s head back to baseball. Sports managers realize player performance assures winning results. Performance can be managed; results cannot. Teams focusing on results (rather than the game) will be outplayed.

Companies wishing to avoid the complacency nurtured by low (or falsified) accident rates often embrace a scorecard that includes activity performance metrics.

Balanced scorecards neutralize the pitfalls of lagging indicators

Peaks, valleys, and unbeatable plateaus are common when tracking results without the upstream activities that drive results. That’s why it is so important to have a balanced scorecard so the consistency of organization’s ongoing activities can be monitored, adjusted, and benched against lagging indicators.

The only way a company can really know if it’s headed for a safer future is to measure activities that reduce risk exposure and losses.





Leading measures of incident management include:

- **Severity ratio.** It's common for there to be more minor incidents than severe incidents. Severity ratios demonstrate proper reporting of all incidents, even the minor ones.
- **Positive to negative ratio.** Making note of safe findings reinforces the notion that positive acts and conditions will not be overlooked.
- **Timeliness of task completion.** Timely completion of tasks and corrective actions helps prevent incidents. Higher risk items often garner additional attention, increased speed of reporting, and corrective action completion.

Measure the quality of activities performed

If a company achieves 100% training completion without any improvement in field competency, what good was the training? Measures must account for quality as well as quantity.

Along these lines, companies should establish measures that grade the quality of activities performed. A company might measure the percentage of non-revised reports to gauge the causal analysis aspect of incident investigation. Measuring involvement helps since some goals can be accomplished by a few highly active employees. Ratios of the types of control methods selected (for example, hazard elimination or engineering controls versus personal protective equipment) can also be quite telling.

Measures and review frequencies vary

One company's set of metrics may not be the same as another company's set of metrics – and this is okay. Choosing to measure everything wastes time and can create “noise” that makes focusing on the most important activities unnecessarily difficult. Goals should drive performance in areas most important to company safety efforts.

Frequent monitoring may be needed after changes to production or periods of poor performance. Reliable, well-controlled processes may require less frequent monitoring. Aspects of the business that don't change quickly may be candidates for less frequent measurement and review.

Comparing and contrasting similar groups

Workplace health and safety requires a total team effort up and down the organization. Managers need goals that ensure supervisor performance. Supervisors need goals that ensure worker and work area performance, and so forth. A properly configured measurement system will ensure that each element of the organization is doing its part to enable success in the safety effort.

There must be enough detail in measures to allow for comparison between departments and divisions.

A good process for monitoring helps ensure weaknesses and best practices will be seen and shared for the betterment of the overall operation. Multiple areas, sites, and even entire corporations should have consistent

measures for accurate comparison of results.

The larger the group measured and the more infrequently progress is measured, the less individual and small group contributions can be recognized (which is bad for those who went out of their way to perform work the safe way). Informal expressions of thanks, like “hey, good job getting help before making that lift,” can go a long way between extended measurement periods. People will know their good work matters even if metric-driven accolades are not happening frequently.

For readers considering a balanced scorecard approach

An incident-free past may seem to indicate the presence of safety, but that's not always the case. Companies need to consider if the right activities are being performed to create a safe and healthful work environment. If safety activities are not being performed and precautions are not being followed, it's just a matter of time until serious incidents happen. Companies that begin tracking leading, activity-based indicators are doing the right thing. They need to keep the faith, as long-standing trends can take time to reverse. In the end, doing the right things for success brings success even though there may be some setbacks along the way.

Make performance tracking fun, or at least make it tolerable

Having performance scrutinized isn't always fun. Information may show one group has out-performed another. Some groups may not have done everything



required. Performance metrics may negatively influence incentive payouts and promotional decisions. On the flip side of the coin, commendations can be given when positive results are visible and that's something everyone should want. Read on for tips to ensure the continuous improvement process will be a positive one.

Tip 1 – Provide lots of performance feedback

Metrics (even the leading ones) reflect PAST performance. Metrics may be reviewed days, weeks, or months after performance takes place. By the time handshakes and congratulations happen, people may have forgotten what they did to succeed. Leading companies provide feedback often so people won't forget what made stellar performance possible. This makes good performance repeatable. What's more, frequent feedback shows people that their efforts are being noticed even when a group's overall performance is mixed.

Tip 2 – Make performance metrics visible

Work teams need open access to safety information and they need to review progress regularly; this way people will know where they stand, will not be caught off-guard, and will know what they should be focusing on.

The reasons for floor-level results should be communicated upwards so managers will not be caught off-guard during higher level review meetings. Well informed managers may then allocate resources necessary for continuous improvement.

Tip 3 – Troubleshoot BEFORE review meetings

Relationships between activities and outcomes must be explained. This means identifying best practices and troubleshooting what's happening in areas that have not met their goals. Much of this troubleshooting should happen before review meetings or else there may be disagreement, confusion and arguments during review meetings.

Tip 4 – Flip negatives into positives

While problems should be viewed as opportunities, having a lot of unresolved "opportunities" doesn't necessarily feel good when it's time to account for area performance. Negatives must be converted into positives (solutions) before review meetings. Even if there's no time to fully implement solutions before review meetings, at least plans can be reported showing that safety is being taken seriously.

Safety is a popularity contest you need to win

Tracking workplace health and safety performance can help demonstrate the relationship between safety results and activities, recognize work done well, and identify opportunities and new best practices while improving safety culture and employee engagement. Despite these benefits, performance tracking will probably be approached with a sense of trepidation. Words are not enough. Companies must show that measurement systems will be fairly administered.

No one wants to look bad during review meetings. Supporters of workplace health and safety don't want people to look bad either, because people may tend to blame systems that make them look bad. Right or wrong, this is exactly what happens in the real world.

Practitioners of traditional safety approaches dole out negative consequences by hiding behind sayings like "safety isn't a popularity contest." I humbly disagree: All aspects of business happen best with the support of others. Companies need to do everything in their power to ensure people who are held accountable for continually improving results have the resources and support necessary to succeed. Safety is a popularity contest which must be won.

AUTHOR

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