BEYOND TRIFR:
Creating Meaningful and Measurable Lead Indicators for Safety

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Your Presenter

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To change the lives of individuals and organisations for the better, every day.
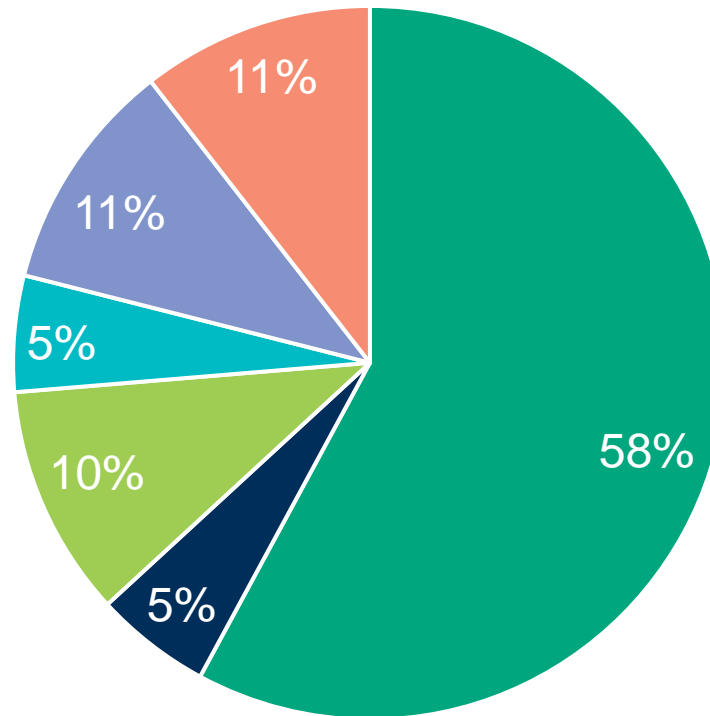
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AGENDA

1 OVERVIEW OF LEAD AND LAG METRICS

2 THE CURRENT CHALLENGES

3 WHAT GOOD LOOKS LIKE

4 WHERE DO WE START?

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How does your organisation measure safety success?

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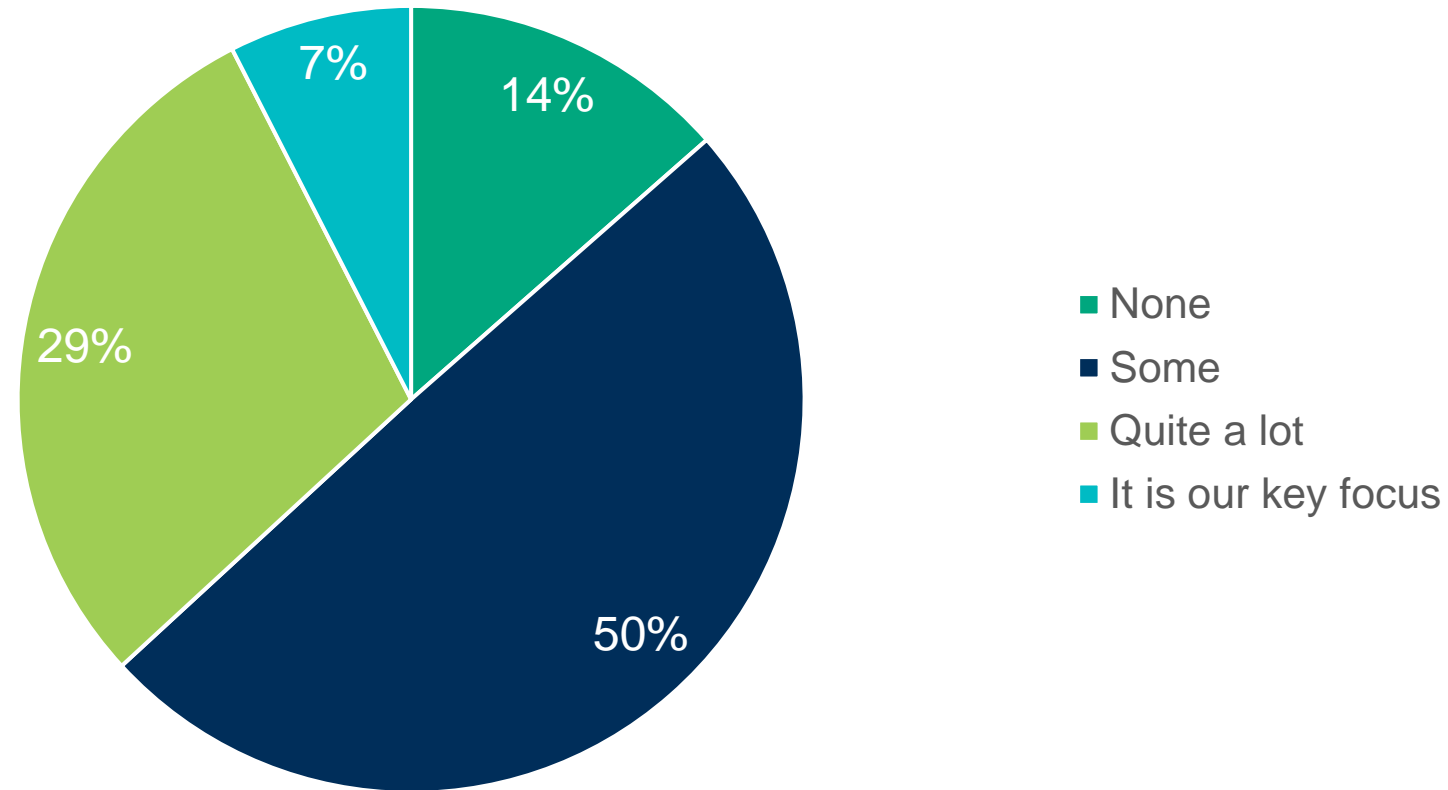

- Incident Rate
- Injury Rate
- Hazard Reporting
- Claim/Premium Cost
- Audit Results
- Lead Indicators

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Let's take a quick poll…

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How much of a focus does your organisation put on lead indicators?

- None
- Some
- Quite a lot
- It is our key focus

14%
50%
29%
7%

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ZERO HARM, LEAD AND LAG INDICATORS ARE A BIG CAN OF WORMS

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IS ZERO HARM INHERENTLY BAD?

A focus on Zero Harm (and lag metrics) has in many cases moved away from the intent and can lead to other issues, e.g. **underreporting** and **manipulation of metrics**

Does not empower the workforce. How do we focus our brains and business on achieving the **absence of something**?

There is danger in reinforcing a **focus on the negative**, especially if tied to reward/recognition programs

How do you **stay motivated** once you have an incident?

Using lag data as an external benchmark is unhelpful as not all organisations track and manage incidents the same way.

Zero does not mean safe

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A BRUTAL FACT

Despite the challenges attached to lag metrics and the debate occurring in this space, these numbers are seen as the benchmark for now.

- Will we ever move away from measuring these things?

- Should we?

- What would be the consequences if we did?

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WE SHOULDN'T DISREGARD LAG METRICS…

- Lag metrics such as TRIFR, near misses, high potential incidents, MTIFR are hygiene metrics

- Governance requires tracking of this data

- There is a responsibility to know whether incidents are trending upwards

- Lag indicator information is another part of the picture. The questions we should be asking are **what story is the data telling us** and **what can we do with this information**?

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LAG INDICATORS IN ACTION

What **story** do your lag indicators tell you? What has gone wrong and right?

How are the activities attached to the metric going to help people be safer/ manage unplanned events?

How can the information be used to **manage future risk**?

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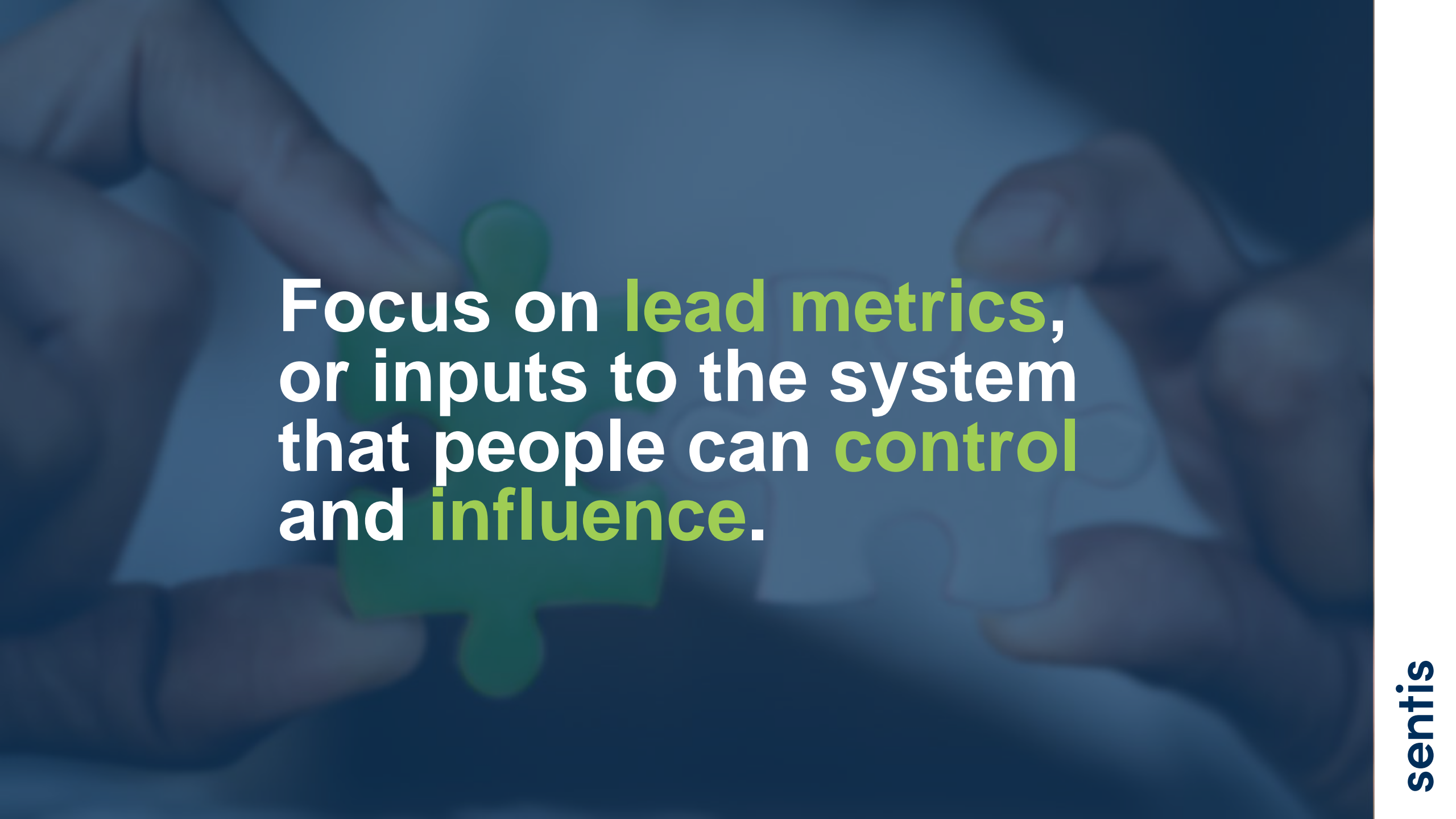How are **lessons learned** communicated?

What opportunities are there to **problem solve** with the workforce?

What lead activities do we need to implement to **ensure a better outcome** in the future?

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If lag metrics are only one part of the puzzle, how do you see the full picture?

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Focus on **lead metrics,** or inputs to the system that people can **control** and **influence.**

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Why isn't there an established industry standard for lead indicators?

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WHY ARE LEAD METRICS SO HARD?

Difficult to prove causation

Can be challenging for organisations to identify and track

Lead metrics may look different depending on your organisations work, strategy and risk profile and where you are in your safety culture journey

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THE BASICS OF LEAD INDICATORS

Don't get stuck in the debate

Instead, focus on **positive** (what do we want to increase or improve) and **negative** (what do we want to see decrease).

Keep it simple

Leverage current metrics and limit new metrics to **one or two at a time** to enable people to get used to them.
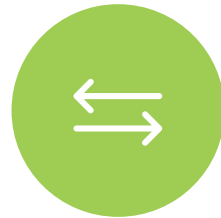
Metrics should drive action

Reflect on what the metrics means and **what would change** if it did or didn't improve.

Make it measurable and review regularly

Consider **how you will measure** the lead metric. Quality/capacity based metrics are best and are also the hardest to measure.

Keep it visible

How will you know if you're winning or losing? How will you keep everyone up to date with **the score**?

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CONSIDERATIONS IN DEVELOPING LEAD INDICATORS

Seek to understand:

- What does your current lag indicator data tell you? What are the **gaps in the story**?

- What do your incidents tell you? What are the **common weak signals** across these? What activities can you implement to support identifying these weak signals?

- What are your people telling you? What is the **perception** of leaders, safety systems etc.?

- Are you ready to measure quality? Have you got the **basics right first**?

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SETTING UP FOR
SUCCESS

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SETTING UP FOR SUCCESS

There are some cultural drivers that will determine how successfully you can transition to focusing on lead metrics:

- Clear safety/organisational vision in place that is communicated well by leadership

- Strong leader engagement in safety and strong safety leadership capabilities

- Systems in place to support safe work

- Carefully consider your reward and recognition system. Still need to be wary about associating reward with lead metrics as this can create a compliance culture rather than a culture of curiosity or continuous improvement—go in with eyes open, considering unintended consequences.

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NOT A SET AND FORGET…

The company doesn't care much about me or my safety, so I don't care much about anything besides looking out for myself and getting the job done.

Most of the time, safety procedures are a burden to getting the job done. But, I need to make sure I'm following them when management is looking.

Safety rules and procedures are there to protect me. It is my responsibility to follow them so that I can stay safe for the things that matter to me.

In part, my safety depends on my teammates. To stay safe as a team, we need to work together and look out for one another.

The company's safety is a core part of everyone's job and a shared responsibility. We strive to improve ourselves and learn from our collective mistakes.

COUNTER PRODUCTIVITY

PUBLIC COMPLIANCE

PRIVATE COMPLIANCE

MATESHIP

CITIZENSHIP

Sentis Safety Culture Maturity Model

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SAFETY CITIZENSHIP
THE GOLD STANDARD OF SAFETY CULTURE

Safety citizenship behaviours include:

- going above and beyond basic compliance

- identifying opportunities to improve safety

- willingly discussing safety concerns with leaders and teammates

- voluntary membership of safety committees

- actively engaging with safety initiatives

- keeping informed about the latest safety changes on site

- monitoring the safety performance of team members to ensure everyone is working safely.

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LEAD INDICATOR EXAMPLES

1. Identify the goal (often a lag measure)

2. Identify and act on the lead measure

3. Keep score to know what is getting done

4. Create a cadence of accountability

Activity	Expected Outcome
Safety Interactions/ Conversations	• Increased quantity • Improved quality as rated by teams • Improved confidence as rated by leaders
Pre-start meetings	• Improved delivery as rated by teams • Improved confidence as rated by leaders • Clear outcomes/direction as rated by teams
Hazard identification	• Increased reporting of hazards • Increased closing out of hazards by those responsible • Improved perception of hazard identification process
PPE	• Increased compliance • Increased feedback regarding fit-for-purpose PPE
Safety Procedures	• Increased compliance • Increased feedback regarding improvement to procedures
Safety visits	• Increased number of safety site visits by management
Safety activities	• Increased number of safety activities performed by team members
Reporting	• Increased reporting of near miss and incident data
Employee input	• Increased employee input into safety decision making

Activity	Expected Outcome
Leaders' confidence	• Increased confidence in leaders to demonstrate safety leadership behaviours
Safety Communication	• Increased quantity of communication between team members, or between members of different teams • Increased quality of communication between team members, or between members of different teams
Safety Improvements	• Increased number of safety improvement suggestions provided by staff
Safety Involvement	• Increased voluntary membership in safety activities and initiatives
Safety Promotion	• Increased promotion of safety initiatives by leaders
Safety Support	• Increased support offered to teammates to complete jobs safely
Safety Training and Coaching	• Attendance at safety training • Attendance at coaching sessions
Employee Perceptions	• Improved result on modules of the Safety Climate Survey (measured using a Pulse Survey, or follow-up SCS)
Safety Leadership Capabilities	• Improved scores as measured by a follow-up SLA (individual or aggregate scores)

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WHAT'S A BETTER APPROACH?

- Review how we reward safety

- Agree on the role safety plays in helping the organisation achieve its objectives

- Get clear on our risk profiles

- Look for patterns in past incidents and theorise potential interventions

- Consider qualitative vs. quantitative lead indicators

- Be clear about the process of collecting data

- Be clear about the story you want the data to tell

- Think about your score board

- Celebrate success!

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Q&A

Over to you

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Get in touch

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