Using Scorecards to Track Leading Safety Performance Activities

ProcessMAP Webinar Series

Introductions

Dexter King,
CDS, CESCO, CFSM

EHS Director – North America
Product Development Group
ProcessMAP Corporation

As an EHS Director – North America, Dexter's primary responsibility is to review on-going system-wide feedback to enhance and ensure continuous improvement of existing EHS, Workers Compensation and Risk Management workflow functionality.

Experience:
25+ years of Safety, D.O.T., Corp. Security & Investigations, Risk Management, Business Resilience and Disaster Preparedness experience.

- U.S. Air Force
- DHL Express
- Brio Investment Group
- City Furniture & Ashley Homestore Furniture

Introductions

Loren Bowe, CSP, PE

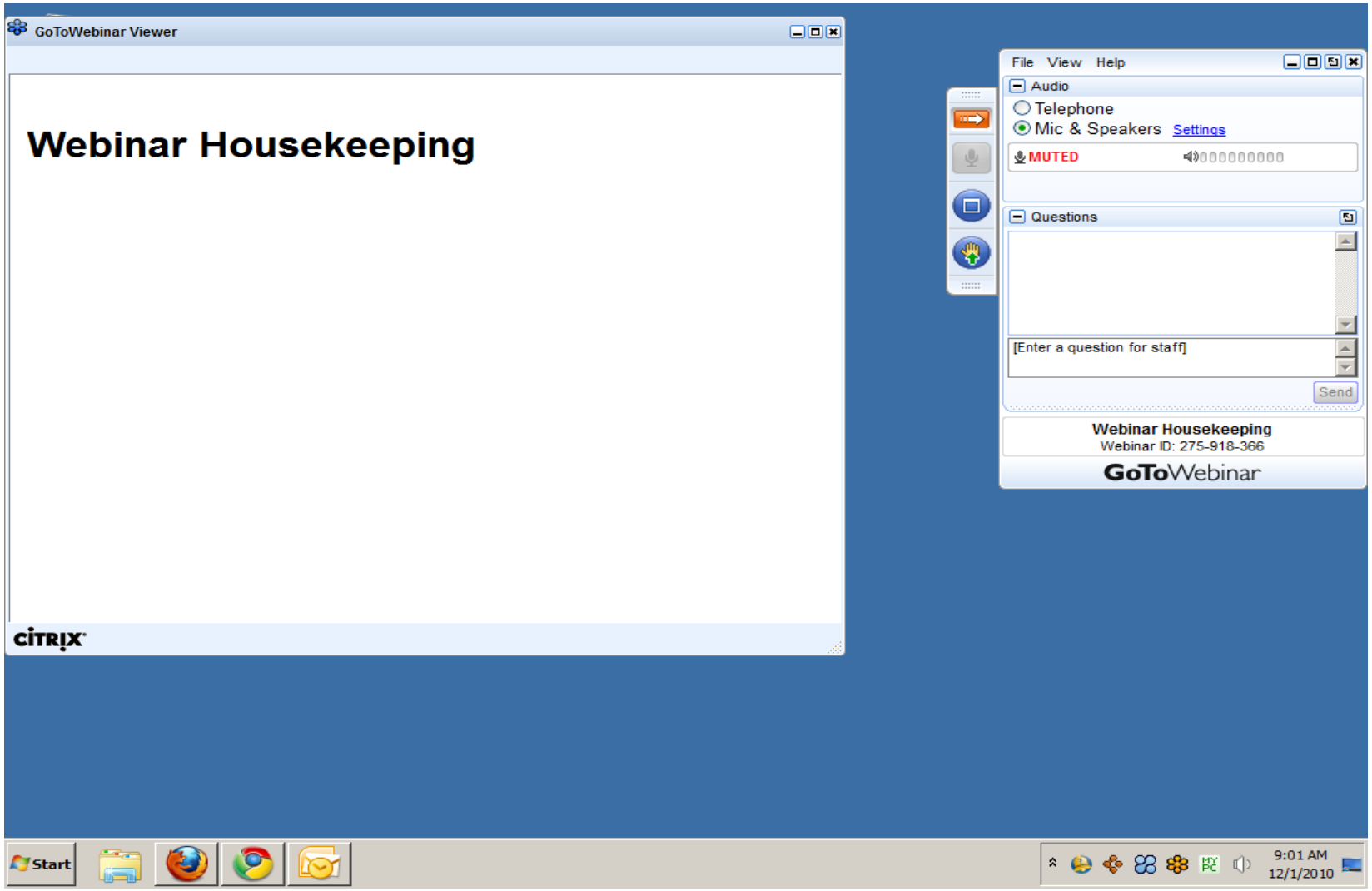
EHS Industry Consultant
LCBowe Consulting, LLC

Global EHS professional specializing in driving premier EHS management and performance in global organizations and diverse industries.

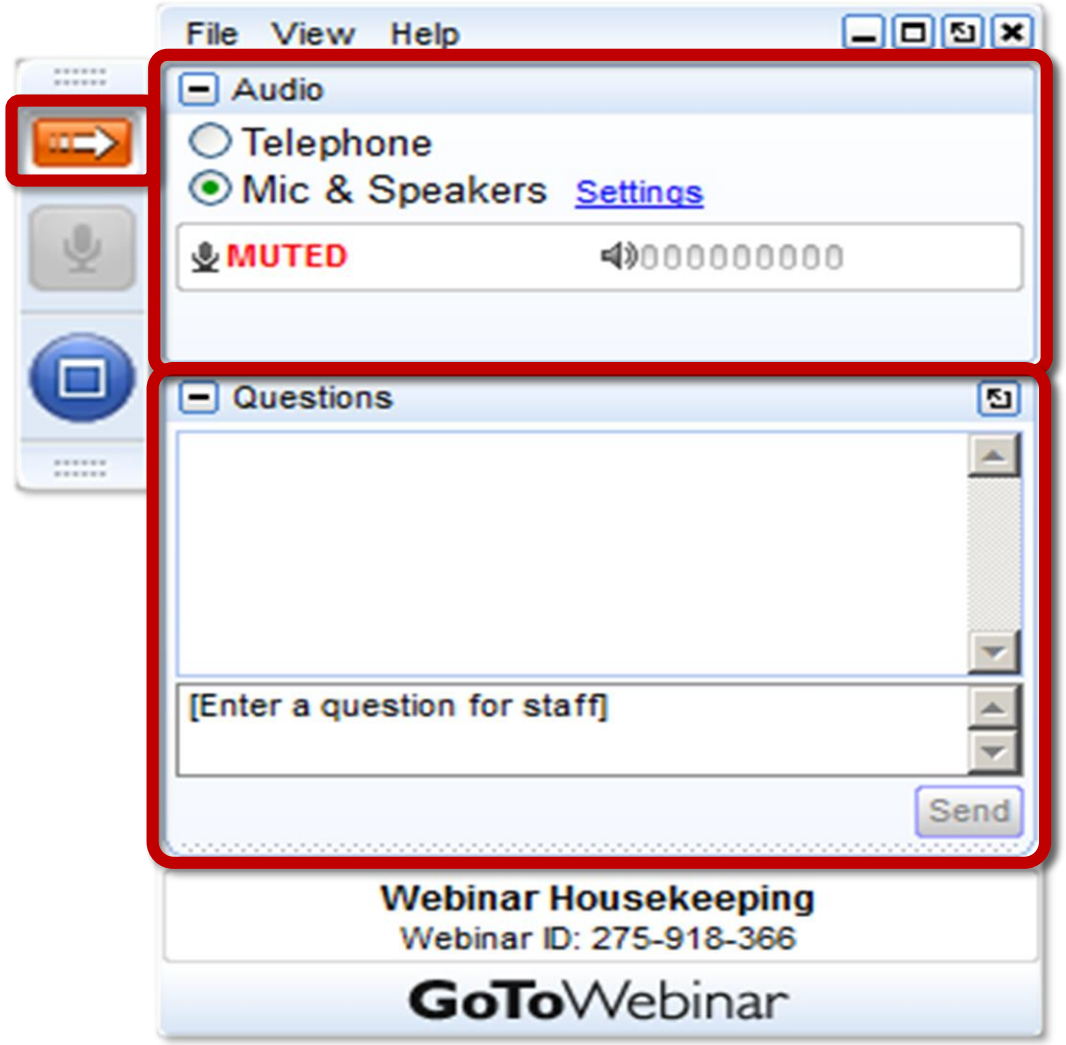
Experience:
Director, Global Environmental, Health & Safety

- Smiths Group plc
- Textron Fluid and Power Inc.
- Greenlee
- Advanced Solutions/Intesys Technologies

Housekeeping – What You See



Housekeeping – Participation



Your Participation

Open and close your control panel

Join audio:

- Choose **Mic & Speakers** to use VoIP
- Choose **Telephone** and dial using the information provided

Submit questions and comments via the Questions panel

Note: Today's presentation is being recorded and will be provided within 48 hours.

Leading Safety Activities - Webinar Series

Part I

"Using Leading Safety Activities to Advance Safety Objectives"

Thursday, June 15th 11 AM EDT

The recording and slides available!

Part II

"Using Scorecards to Track Leading Safety Performance Activities"

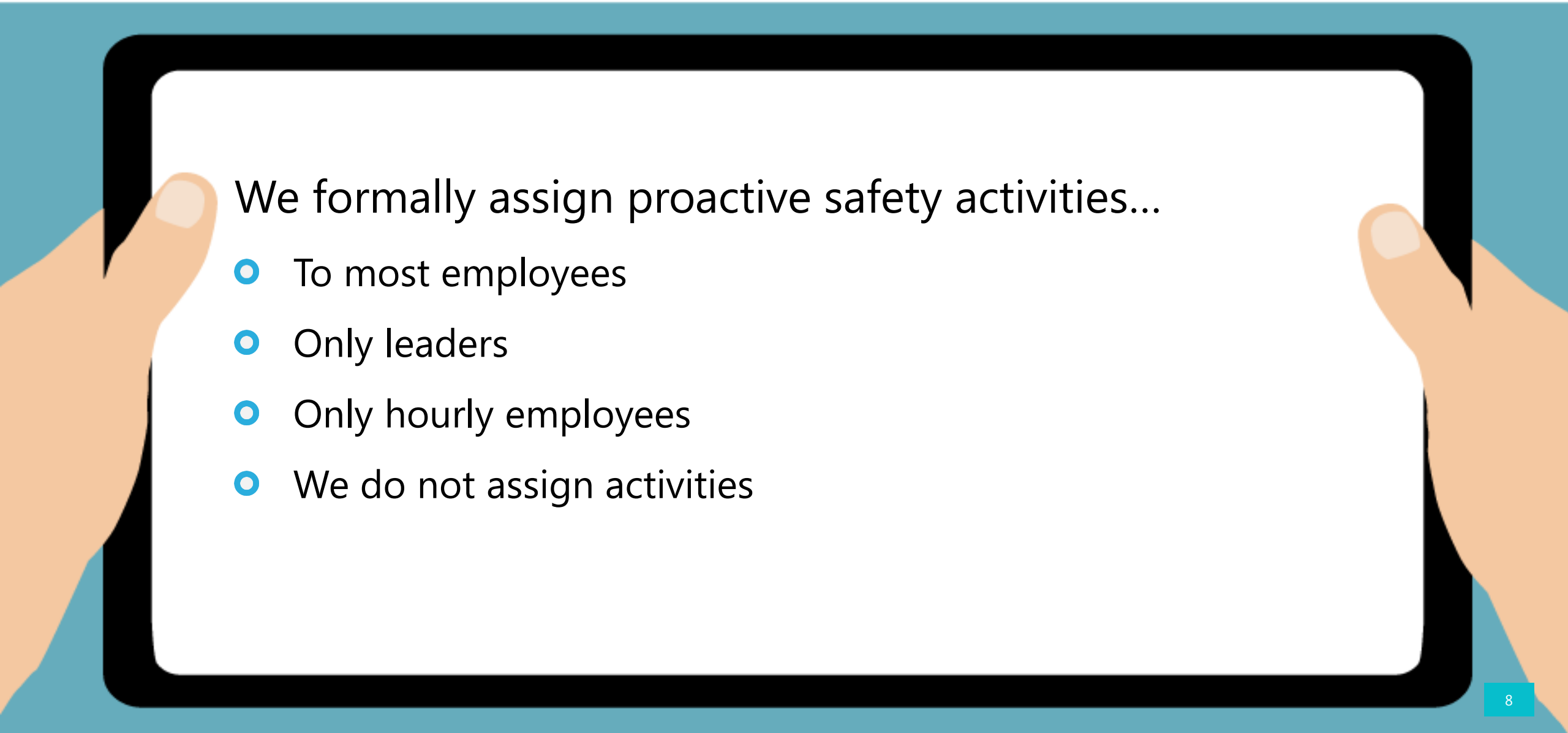
Thursday, June 29th 11 AM EDT

Recording and slides to be sent to registrants on Wednesday, July 5th

Overview

1. Leading Safety Performance Activity Metric
2. Safety Scorecard Design
3. Leading Safety Performance Score Calculations
4. Roll-up Score for Multiple Locations
5. Safety Scorecard Tools
6. ProcessMAP's Safety Activity Scorecard Solution
7. Q&A

Polling Question #1



We formally assign proactive safety activities…

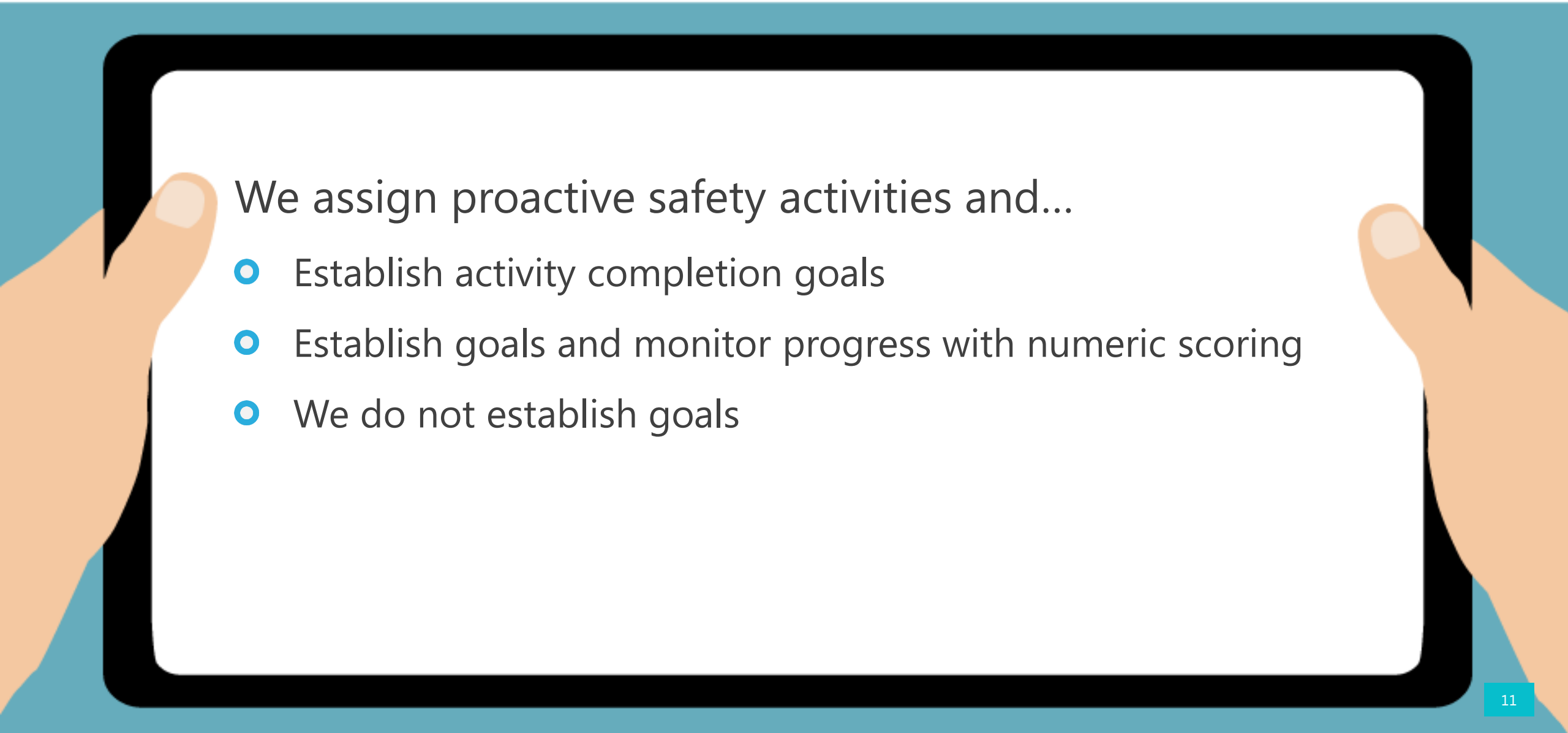
- To most employees
- Only leaders
- Only hourly employees
- We do not assign activities

Leading Safety Performance Activity Metric

Leading Safety Activity Examples

Increasing leadership and employee involvement in safety	Safety leadership tours, employee safety observations
Identifying exposures and injury risk	Job hazard assessments, reporting of safety improvements
Increasing employee knowledge of safety	Employees completing required training
Improving ongoing monitoring of safety processes & conditions	Site safety audits and inspections
Formalizing the safety management process	Written standard operating procedures or formal training documentation

Polling Question #2



We assign proactive safety activities and…

- Establish activity completion goals
- Establish goals and monitor progress with numeric scoring
- We do not establish goals

Safety Activity Scorecard Design

PURPOSE

Monitors Activity Completion

PROCESS

Calculates a Percentage of Safety Activities Completed:

1. Assigns a weight of importance to each activity (to total 100%)
2. Compares score to a goal (e.g. 90% of activities to be completed by end of the year)
3. Calculates score for various periods (such as monthly, quarterly, annually)

Leading Safety Performance Score Calculations

Assume a company requires each site to complete 6 of activities during the year (site tours, inspections, etc.)

Each site identifies the number of each activity to be completed each month and the total for the year

Each activity is given a weight of importance (to total 100%)

The site score is the percentage of the activities completed year to date

Example – Annual Activities Plan

- **Leadership Tours:**
  Site leadership team (5) completes 60 leadership tours (1 tour/leader/mo.) Weight 20%
- **Safety Talks:**
  Line supervisors (8) complete 416 safety talks (1 talk/week/supervisor) Weight 30%
- **Recommendations:**
  Employees (100) report 200 safety recommendations (avg 2/employee) Weight 20%
- **Risk Assessments:**
  Employees complete 24 risk assessments (avg 2/month) Weight 10%
- **Inspections:**
  Employees complete 240 area safety inspections (20/month) Weight 10%
- **Training:**
  Employees (100) complete 1000 hours total safety training (10/employee) Weight 10%

Total Weight = 100%

Example – Annual Activities Actually Completed

- **Leadership Tours:**
  Site leadership team (5) completes 60 leadership tours (1 tour/leader/mo.)
  Weight 20% Actual: 80 tours completed
- **Safety Talks:**
  Line supervisors (8) complete 416 safety talks (1 talk/week/supervisor)
  Weight 30% Actual: 395 talks completed
- **Recommendations:**
  Employees (100) report 200 safety recommendations (avg 2/employee)
  Weight 20% Actual: 267 recommendations submitted
- **Risk Assessments:**
  Employees complete 24 risk assessments (avg 2/month)
  Weight 10% Actual: 22 risk assessments completed
- **Inspections:**
  Employees complete 240 area safety inspections (20/month)
  Weight 10% Actual: 219 inspections completed
- **Training:**
  Employees (100) complete 1000 hours total safety training (10/employee)
  Weight 10% Actual: 944 hours completed

Score Calculation Example

The site score is the percentage of the activities completed year to date as follows:

Leading Safety Performance Score for month "m" =

[(Σ Activity 1 completed from month 1 to month m) / (Annual Goal of Activity 1) x (Weight of Activity 1)] +…
[(Σ Activity 6 completed from month 1 to month m) / (Annual Goal of Activity 6) x (Weight of Activity 6)]

Score Calculation Example

The site score is the percentage of the activities completed year to date as follows:

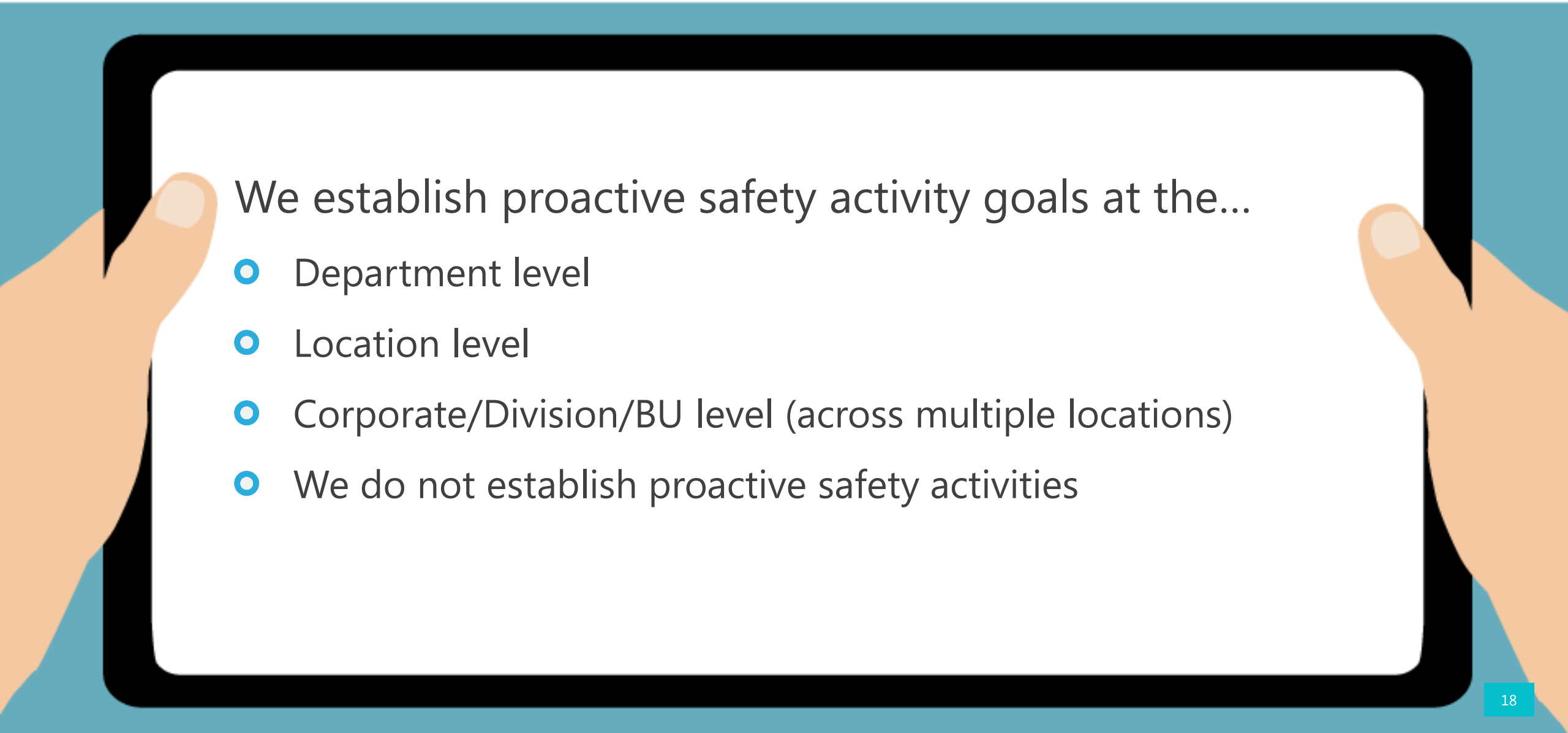
Activity	Actual Completed (year-end)	Required	Completed/ Required	%Weight Importance	Complete/ Required x %Weight
Leadership Tours	60*	60	1.00	20	0.200
Safety Talks	395	416	0.950	30	0.285
Recommendations	200*	200	1.00	20	0.200
Risk Assessments	22	24	0.927	10	0.093
Inspections	219	240	0.913	10	0.091
Training	944	1000	0.944	10	0.094
Total				100	**0.962**

Leading Safety Performance Score *(year-end) = 0.962 or* ***96***

*Note: No extra credit for exceeding goal for an activity

Recommended Goal is 90!

Polling Question #3



We establish proactive safety activity goals at the…

- Department level
- Location level
- Corporate/Division/BU level (across multiple locations)
- We do not establish proactive safety activities

Roll-up Score for Multiple Locations

Roll-up score for multiple locations use a weighted average based on a weighting factor such as headcount, revenue, hours worked, etc. for each site.

Weighted Average Score *for "n" sites =*

$$\frac{[(\text{LSP Score Site 1} \times \text{Headcount Site 1}) + (\text{LSP Score Site 2} \times \text{Headcount Site 2}) + \ldots (\text{LSP Score Site n} \times \text{Headcount Site n})]}{[\text{Headcount Site 1} + \text{Headcount Site 2} + \ldots \text{Headcount Site n}]}$$

Example - Roll-up Score for Multiple Locations

Location	Leading Safety Activity Score	Headcount	Score x HC
Chicago	78	35	2730
Baltimore	89	165	14685
Wichita	96	266	25536
Phoenix	92	45	4140
Houston	91	156	14196
Total		**667**	**61287**

Roll-up Score = Σ(Score x Headcount) / Σ(Headcount) = 61287/667 = **92**

Safety Scorecard Tools

Formal methods and tools are needed to record activity completion, calculate scores, and view progress

Scorecard tools include

- ProcessMAP Safety Activity Scorecard solution
- Spreadsheets
- Custom developed software

Design tool so it is easy to re-configure annually and accommodate changes in activities, locations, business design, etc.

ProcessMAP's Safety Activity Scorecard Solution

Cloud-based safety scorecard solution accessible from desktop or mobile devices

Very configurable to meet specific industries and business function requirements

Reports safety activity completion scores to key stakeholders using interactive real-time dashboards and alerts

Employees can be assigned activities and completion tracked by using ProcessMAP's Activity & Action Items Management solution

ACTION ITEMS MANAGEMENT SOFTWARE

Activity & Action Items Management

Overview

Simplify compliance across your organization

Automates action items tracking through completion, establishes accountability, and manages risk

USER DEFINED ACTION ITEM

- View action items with unmatched ease and leverage the ability to filter action items by various options.

SEAMLESS TASK TRANSFER

- Transfer tasks and activities to other users, thereby avoiding delays due to leaves and separations.

COMPREHENSIVE SEARCH

- Keep a track of critical audit finding with a comprehensive search functionality.

EFFECTIVE COST MANAGEMENT

- Effectively manage costs by estimating the financial impact associated with each task.

Activity & Action Items Management

Key Functions

Calendar Based Task Management

Variable Task Configuration

Seamless Task Transfer

Multiple Ownership Model

Action Item Management

Multiple Calendar View

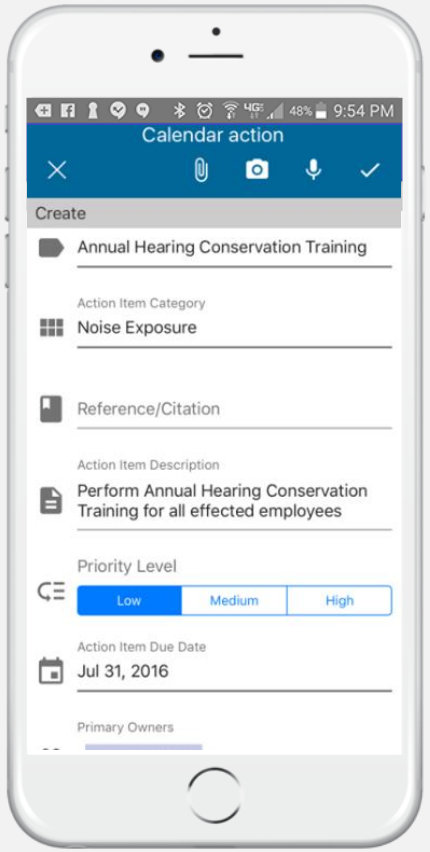
Ensure Regulatory Compliance

Integration

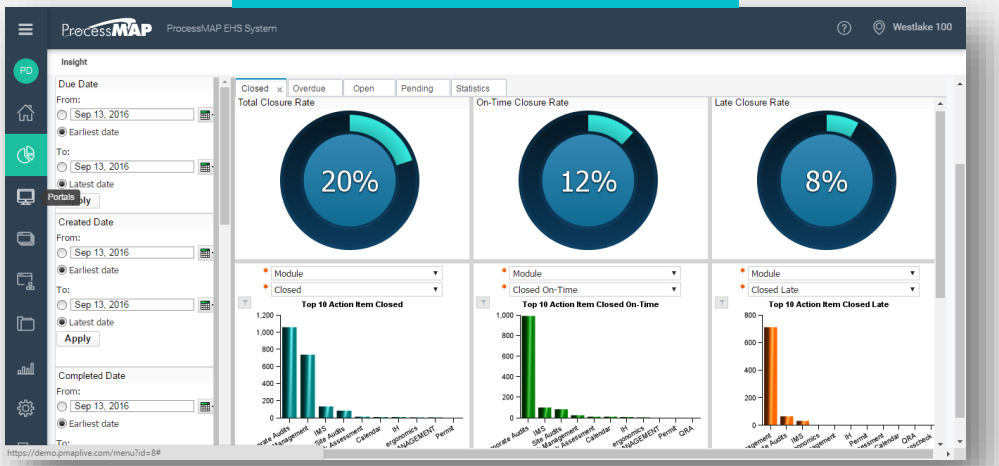
Integrated with Other Modules to Pull Action Items (e.g., From Audit)

Activity & Action Items Management

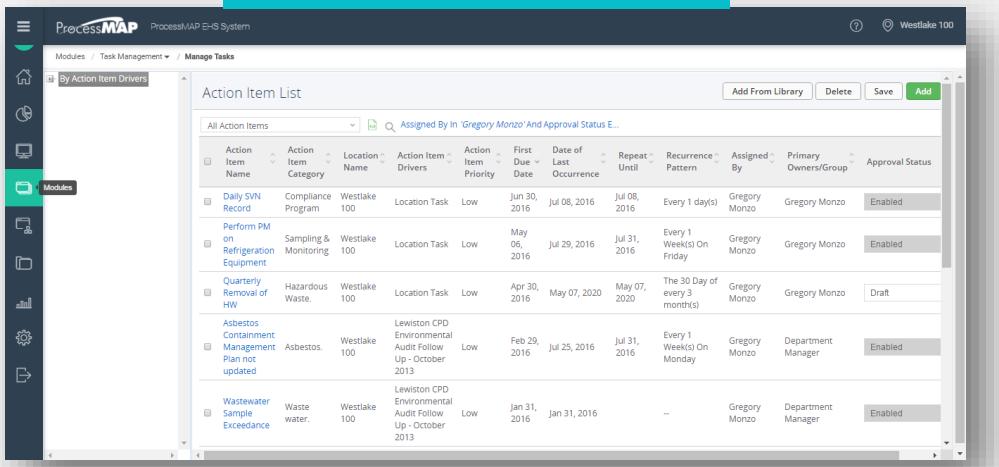
Screenshots

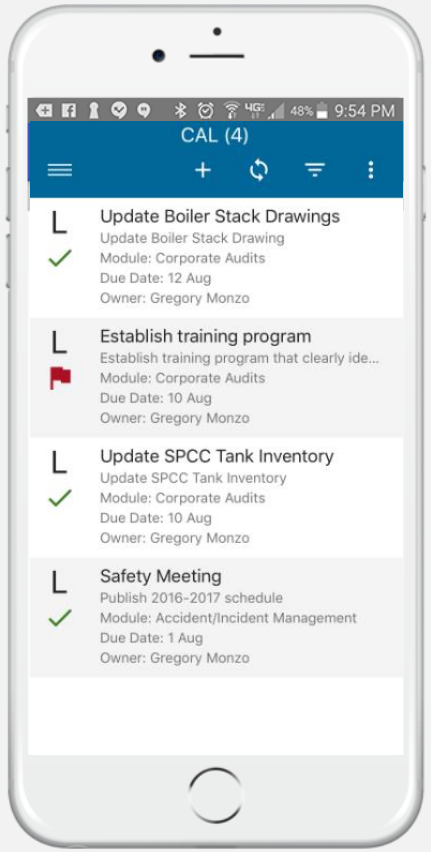


DASHBOARD



ACTION ITEM LIBRARY





Q&A

THANK YOU

CONTACT US:

13450 W. Sunrise Boulevard, Suite: 160

Sunrise, FL 33323, USA

T:+1.954.908.4000

sales@processmap.com

www. facebook.com/processmap

www. twitter.com/processmap

www.processmap.com

www.linkedin.com/company/processmap-corporation