



EHS PLAYBOOK TO DEVELOP A COMPANY-WIDE SAFETY CULTURE

BY CHIP DUFFIE / EHS MOMENTUM



Introduction

WHAT IS A “SAFETY CULTURE?”



A Safety Culture is a dynamic, sometimes fleeting, employee belief that is rooted in trust of management. It is defined by the shared values, beliefs, attitudes, and norms within an organization regarding operational safety. It represents the collective commitment to prioritize and promote safety at all levels of the organization.

If leadership truly believes that safety can drive the big 3 – productivity, profitability and morale – then you have the foundation upon which you can build a leading EHS program.

Simply put, a positive Safety Culture is the collective mindset of employees that management values their safety above anything else.

Play



CREATE A HIGH LEVEL HEALTH AND SAFETY POLICY



WHAT IT MEANS

This is the document that identifies your company's commitment to employee safety. This policy is designed to be shared with all stakeholders, AND must be signed by executive management. This is the company's unwavering commitment to safety.

CUSTOMIZE YOUR PLAY

On the next page, develop a policy that management will sign and can be shared publicly with customers, employees, and regulators. The goal is to keep it to a single page that shows the company commitment at a very high level. This is not a place for detailed policies or procedures, but is the overarching commitment of the company.

Play 1

Play 1

Play 1

CREATE A HIGH LEVEL HEALTH AND SAFETY POLICY

[illegible]

Play 1

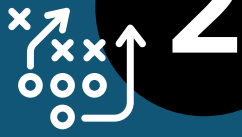
Play 1

Play 1

CREATE A HIGH LEVEL HEALTH AND SAFETY POLICY

This image shows a full page of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook or legal stationery. There are no margins, text, or other markings present.

Play



IDENTIFY INDIVIDUALS ROLES AND RESPONSIBILITIES FOR EHS PROGRAM SUCCESS



WHAT IT MEANS

Understanding the role of each employee is critical to all EHS programs. In order to be effective, every employee must understand their role in driving a safety culture and defining program ownership is key. Frontline, operational employees must own safety, while EHS and safety teams support safety.

CUSTOMIZE YOUR PLAY

On the next page, list each role and then provide a high level overview of their program responsibilities.

Example: EHS Manager - The EHS Manager is responsible for program support, data gathering, and management reporting. In addition, the EHS manager is the primary point person for any regulatory inquiry or inspection.

2

IDENTIFY INDIVIDUALS ROLES AND RESPONSIBILITIES FOR EHS PROGRAM SUCCESS

This image shows a full page of white paper with horizontal grey ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Play



3

SEPARATE ALL JOB TITLES INTO JOB TYPES

Maintenance Manager	Maintenance
Maintenance Operator A	Maintenance
Operations Controller	Operations
Procurement Specialist	Administrative
Production Manager	Packaging
VP Human Resources	Administrative
Warehouse Manager	Shipping and Receiving

WHAT IT MEANS

In order to more easily track and trend incidents, assign regulatory training, and simplify assignments, boil all your company job titles into a more manageable list of job types. By aligning jobs with similar safety requirements and needs, it gets much easier to assign training, track injuries and trend EHS related data.

CUSTOMIZE YOUR PLAY

On the next page, categorize all job titles into job types. These are broad descriptions that allow you to group similar roles together for purposes of training and incident trending. For example, Accounts payable and the CEO may be in an Administrative job type, while a maintenance technician and maintenance lead may share the Maintenance to type. The goal is group by task, not by title. . . Administrative assistant -> Administrative (may include CEO and accounts payable)

Play

3



SEPARATE ALL JOB TITLES INTO JOB TYPES



3

SEPARATE ALL JOB TITLES INTO JOB TYPES

[illegible]

Play 4

CREATE A TRAINING MATRIX BY JOB TYPE

Job Type	New Hire Orientation /General Safety	DOT	First Aid/AED/CPR	LOTO Authorized	LOTO Affected	Hearing Conservation
Administrative	Required	Not Required	Not Required	Not Required	Required	Not Required
Engineering	Required	Optional	Required	Not Required	Required	Required
Facility Manager	Required	Not Required	Required	Not Required	Required	Required
Loader Operator	Required	Optional	Required	Not Required	Required	Required
Maintenance	Required	Not Required	Required	Required	Required	Required
Manufacturing	Required	Not Required	Required	Not Required	Required	Required
Packaging	Required	Not Required	Required	Not Required	Required	Required
Quality Technician	Required	Not Required	Required	Not Required	Required	Required
Shipping and Receiving	Required	Required	Required	Not Required	Required	Required
Truck Driver	Required	Required	Required	Not Required	Required	Required
SUGGESTED REFRESHER	n/a	3 years	2 years	1 year	3 years	1 year
EXAMPLE						

WHAT IT MEANS

Use your Job types to assign specific training requirements.

CUSTOMIZE YOUR PLAY

List all your job types in a column, and then use the rows to list all available training. If a job type needs to take a training course, then indicate that requirement so it creates a matrix for all job types and their required training. You can either use the provided sheet on the next page, or...

PRO TIP: Use a spreadsheet and try using color coding like in the image above. Using colors like (red-light, green-light) helps the viewer to get a quick visual of the requirements.



Play 4

CREATE A TRAINING MATRIX BY JOB TYPE

[illegible]

Play



5

ESTABLISH KEY EHS METRICS TO TRACK

*You can't manage what
you don't measure.*

Peter Drucker

WHAT IT MEANS

Decide what metrics are important for your company to help move the needle. Lagging indicators like injury rates, spills, and vehicle accidents are important but only look backwards. Also, include learning indicators like training rates and safety observations to round out your data gathering.

CUSTOMIZE YOUR PLAY

Develop a list of key EHS metrics to track and decide upon how often you will report them and to whom.

PRO TIP: Only track metrics that are easy to track and make sure to educate your audience why they are important. Usually, monthly reporting is about the right frequency.

ESTABLISH KEY EHS METRICS TO TRACK

[illegible]

Play



6

SET A REPEATABLE OPERATIONAL ACTION CADENCE



WHAT IT MEANS

Operations is focussed on production, so make sure you are clear on what you need them to do on a routine basis. Safety programs are less effective when seen as an add-on; instead, collaborate with operation personnel to make sure the way they do things is actually the safest way.

CUSTOMIZE YOUR PLAY

On the next page, develop a wish list of 5-10 items that you want Operations to do. For example, conduct daily equipment inspections, always wear PPE or always perform a JHA at a customer site.

Take this list to your operations leadership and get aligned on your department's expectations.

Play



6

SET A REPEATABLE OPERATIONAL ACTION CADENCE

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

Play



7

BUILD A MEANINGFUL SAFETY MANAGEMENT COMMITTEE



WHAT IT MEANS

A tried and true methodology for successful program governance is an executive led safety committee. The keys to long term sustainability: keep it simple, alternate meeting leaders, use consistent reporting template, and use real-world issues. These keys can help you build a rhythm and keep the meetings fresh.

CUSTOMIZE YOUR PLAY

Make a list and identify 1) who needs to be there, 2) the meeting frequency (ex. monthly); 3) what metrics get reviewed; 4) who owns content and 5) what other departments must be engaged (ex. Operations, quality and/or HR)?

Play



BUILD A MEANINGFUL SAFETY MANAGEMENT COMMITTEE

Who needs to be there

Meeting frequency

What metrics get reviewed

Who owns content

What other departments must be engaged

Play



USE A HEAT MAP TO PRIORITIZE LIMITED RESOURCES



WHAT IT MEANS

Need to be in more places than humanly possible? You must prioritize your time based on risk. Develop a heat map for your operations, and this can mean by locations or department.

CUSTOMIZE YOUR PLAY

Develop a risk score 1-5 with 5 being very risky and grade the following on the next page based on these concepts:

- **Leadership (whether over a site or department). Ask yourself honestly - do they get it? Are they truly putting safety over production?**
- **Work activity. Identify 3-5 things that the site/department does consistently and grade the level of risk associated with that activity**
- **History of Incidents/injuries or noncompliance - Has this site or department had issues in the past? If so, they are more risky**

Once you grade your target on these three criteria, you know you should focus on the riskiest operations first.

Play



8

USE A HEAT MAP TO
PRIORITIZE LIMITED
RESOURCES

Leadership

Work activity

History of incidents/injuries
or noncompliance

5

4

3

2

1

Play



IDENTIFY CORE SAFETY PROCEDURES



WHAT IT MEANS

Having detailed procedures is important, but you also need to do a full inventory of what you have and what you need to update. Do you have what you need and what actually applies to each location?

CUSTOMIZE YOUR PLAY

On the next page, generate an inventory of existing policy and procedures (ex. LOTO, Confined Space, HazCom etc, and establish when they were created. This will allow you to check for gaps and flag policies that may be outdated.

Play 9

Play 9

IDENTIFY CORE SAFETY PROCEDURES

Play 10



MAKE SURE YOU ARE
INSPECTION READY



WHAT IT MEANS

Nothing is worse (or more available) than getting caught flat-footed by a regulator. Every location must have certain things always ready for inspection (ex. OSHA log, evacuation plan, permit required info). Not being prepared can turn a visit into an audit and can make even the most easy going regulator become unnecessarily suspicious or demanding.

CUSTOMIZE YOUR PLAY

On the next page, create a list of the 5-10 items that must be at-the-ready and make sure you know who else knows about it in case you are not available.

Play



10

MAKE SURE YOU ARE
INSPECTION READY

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

FINAL PLAY!



11

IDENTIFY YOUR KEY TOOLS FOR SUCCESS



WHAT IT MEANS

You need more than spreadsheets and a hard hat to build a successful EHS program. You need tools and resources at your disposal. Most times these things take budget, but you will never get what you never ask for, so be ready to hit management up when the time's right. Whether it be software, training or even the right consultant - identify what you need to be successful.

CUSTOMIZE YOUR PLAY

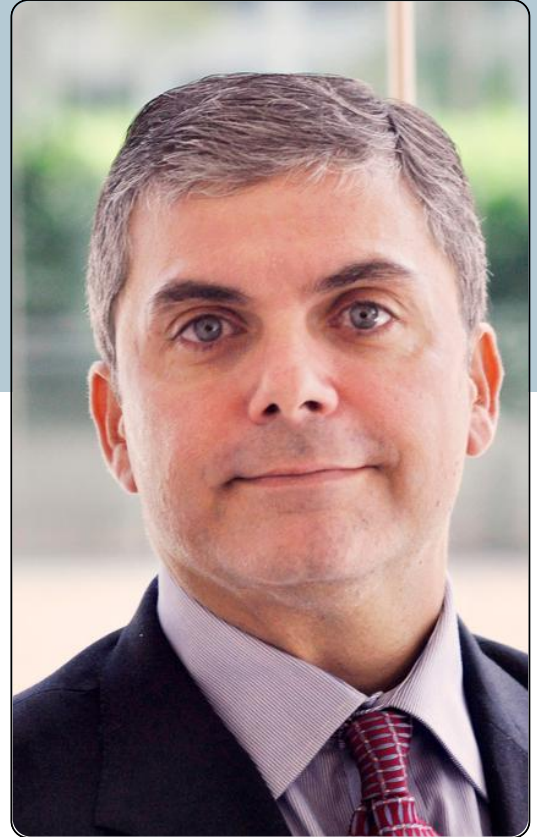
Develop and prioritize a list of resources and tools that you need to take your program to the next level.

11

IDENTIFY YOUR KEY TOOLS FOR SUCCESS

ABOUT THE AUTHOR

EHS Momentum was built by Chip Duffie, a former corporate survivor who is passionate about bringing big company best practices to under-resourced EHS teams.



Founded in 2016, it began with a passion and commitment for people and a core belief that any size company can build a culture where safety and compliance drive productivity, profitability and morale.

Today, we help companies in multiple industries leverage proven techniques and cutting edge software to improve performance.

**DO YOU NEED
MORE HELP?**

schedule a call



cduffie@ehsmomentum.com

EHSmomentum.com