

# Comprehensive safety excellence checklist

A guide for safety professionals to enhance incident prevention, employee engagement, and organizational culture



Safety is not just a value; it's a way of life for organizations committed to protecting their employees, reputation, and bottom line. In today's dynamic work environment, achieving safety excellence is more critical than ever.

This white paper, an extension of the knowledge shared in our webinar, "Avoiding EHS Pitfalls: OSHA, Engagement & KPIs," is designed to help safety professionals enhance incident prevention, employee engagement, and organizational culture. Building on insights from Jeramy Hurt and Josh Sandoval, we offer a comprehensive checklist that serves as a roadmap for translating knowledge into actionable steps.

## Why safety excellence matters

Before diving into the checklist, it's crucial to understand why safety excellence is a fundamental driver of success for organizations:

- ▶ **Employee wellbeing:** A safe workplace improves employee morale, health, and job satisfaction, leading to lower turnover and higher productivity.
- ▶ **Reputation:** Demonstrating a commitment to safety enhances an organization's reputation and can attract top talent and business opportunities.
- ▶ **Cost savings:** Safety excellence reduces incidents, medical costs, and workers' compensation claims, ultimately saving organizations money.

Now, let's explore the enriched checklist for safety professionals.

# Checklist for safety professionals: enhancing safety, engagement, and culture

## 1. Evaluate current practices

- ▶ **Example:** Conduct a thorough assessment of existing safety practices, identifying strengths and weaknesses.
- ▶ **Importance:** Pinpointing areas of improvement ensures a targeted and effective safety strategy.
- ▶ **Uncover:** Potential gaps in safety protocols, areas for improvement, and strengths to build upon.

## 2. Learn from peers

- ▶ **Example:** Engage in benchmarking with seasoned professionals through safety organizations to understand their successful safety implementations and uncover innovative safety measures leveraged by industry peers that could be adapted.
- ▶ **Importance:** Real-world insights help in avoiding common pitfalls and adopting proven strategies.
- ▶ **Uncover:** Best practices, innovative safety approaches, and valuable insights from experienced peers.

## 3. Utilize EHS software

- ▶ **Example:** Implement EHS software, such as [Ideagen Lucidity](#), for streamlined data management, enhancing employee participation and accountability. Track metrics such as a surge in near miss reporting, after implementing user-friendly reporting tools.
- ▶ **Importance:** Technology optimizes safety processes, fostering a proactive safety culture by sharing incident lessons learned and assigning an applicability review. Utilization of mobile device features such as taking pictures, managing assets and having offline capability enhances safety processes.
- ▶ **Uncover:** Improved data management, increased employee participation, and enhanced accountability through automatic action item reminder notifications.

## 4. Participate in polls

- ▶ **Example:** Conduct polls to measure employee engagement in safety programs and identify areas for improvement. Identify if employees feel uncomfortable reporting safety concerns directly to supervisors.
- ▶ **Importance:** Regular feedback ensures a continuous understanding of the workforce's safety mindset. Streamlining the reporting process will help encourage reporting.
- ▶ **Uncover:** Employee engagement levels, areas for improvement, and potential barriers to engagement.

## 5. Focus on historical data

- ▶ **Example:** Analyze historical incident data to identify patterns and prioritize risk-prone areas. Identify recurring incident trends during specific operational shifts or locations.
- ▶ **Importance:** Informed decision-making based on historical trends reduces the likelihood of recurring incidents. Identify overall EHS program gaps by increasing the sample size.
- ▶ **Uncover:** Trends in incident data, high-risk areas, and patterns that need attention locally and on a corporate level.

## 6. Refer to Safe Work Australia

- ▶ **Example:** Review and conduct a gap analysis leveraging [Safe Work Australia](#) data, research and resources, considering industry specific insights (Local and National).
- ▶ **Importance:** Adhering to regulatory standards enhances overall safety compliance. Go beyond compliance with best practices.
- ▶ **Uncover:** Align with Safe Work Australia best practice, identify any compliance gaps and areas that may require immediate attention.

## 7. Address changes

- ▶ **Example:** Utilize a management of change process for modifications within the facility layout, process, and machinery. Highlight potential safety risks associated with a new manufacturing process or equipment.
- ▶ **Importance:** Proactive planning mitigates risks associated with environmental and internal changes.
- ▶ **Uncover:** Potential safety risks associated with changes, areas requiring attention, and preparedness levels.



## 8. Prioritize training

- ▶ **Example:** Regularly updating training materials based on incident learnings, employing creative approaches for engaging sessions. Identify the need for in-person, hands-on training sessions after an increase in incidents despite regular online training.
- ▶ **Importance:** Continuous training ensures a well-informed and safety-conscious workforce.
- ▶ **Uncover:** The effectiveness of training materials, gaps in knowledge, and areas where creativity can enhance training.

## 9. Celebrate wins

- ▶ **Example:** Acknowledge and celebrate leading indicator safety achievements, building a positive safety culture. Track an increase in reporting of positive safety behaviors after implementing a recognition program.
- ▶ **Importance:** Recognizing successes motivates employees and reinforces the value of safety practices.
- ▶ **Uncover:** Positive safety behaviors, opportunities for recognition, and a growing safety culture.

## 10. Implement a transparent reporting system

- ▶ **Example:** Utilize technology for incident reporting, ensuring diverse reporting options for varying comfort levels. Identify underreporting of incidents due to a lack of trust in the reporting process.
- ▶ **Importance:** A transparent system encourages open communication and quick incident resolution.
- ▶ **Uncover:** Barriers to incident reporting, underreporting, and increased transparency.

## 11. Set KPI targets for participation

- ▶ **Example:** Define KPIs for on time action item closure and timely incident analysis and sharing of lessons learned establishing realistic participation targets.
- ▶ **Importance:** Clear targets drive active participation, fostering a culture of safety awareness.
- ▶ **Uncover:** Participation levels, areas needing improvement, and successes in participation.

## 12. Involve frontline leadership

- ▶ **Example:** Encourage frontline supervisors to review incident reports, leveraging their local knowledge for effective risk assessments.
- ▶ **Importance:** Frontline involvement ensures a deeper understanding of on-site safety challenges.
- ▶ **Uncover:** Local insights, risk assessments, and a better understanding of on-site safety challenges.

### 13. Measure safety culture

- ▶ **Example:** Establish a safety culture curve, using a scale to describe the current state of the safety culture. Uncover attitudes of complacency in the workplace.
- ▶ **Importance:** Continuous measurement guides the evolution of a positive safety culture.
- ▶ **Uncover:** The current state of safety culture, attitudes, and areas for culture improvement.

### 14. Close the communication loop

- ▶ **Example:** Communicate with employees who report incidents, providing updates on reported issues and action item closure progress.
- ▶ **Importance:** Closing the loop fosters trust and demonstrates a commitment to addressing safety concerns. Communication also builds relationships to strengthen reporting and improvement suggestions.
- ▶ **Uncover:** Trust levels, commitment to addressing safety concerns, and opportunities for improvement in communication.

### 15. Use technology appropriately

- ▶ **Example:** Provide multiple reporting options, including both digital and non-digital methods, to accommodate diverse preferences.
- ▶ **Importance:** Accessible reporting tools ensure broader participation and inclusivity in safety reporting.
- ▶ **Uncover:** Diverse reporting preferences, inclusivity in reporting, and increased participation.

The comprehensive safety checklist is a valuable resource for safety professionals seeking to enhance incident prevention, boost employee engagement, and nurture a robust safety culture within their organizations. Building on the insights from our recent webinar, this checklist offers actionable steps to translate knowledge into practice. It emphasizes the importance of leveraging advanced tools like Ideagen Lucidity to streamline safety management and encourage employee participation, ultimately transforming safety into a way of life for your organization.

This checklist is not a static document; it's a living tool that adapts to your organization's evolving needs. By following its steps, from evaluating current practices to celebrating wins and implementing transparent reporting systems, you can establish a proactive safety culture that becomes ingrained in your workplace. Together, we can set new standards for safety excellence, ensuring a safer, more engaged, and resilient workforce. So, let's take this journey, turn insights into actions, and build a brighter, safer future for all.