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# THE SAFETY METRICS EVERY BUSINESS SHOULD TRACK

SEPTEMBER 2025

NORTH RISK WEBINARS | 2025

# PRESENTER

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EHS Regional Director  
KPA

# LOGISTICS

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Ask questions via the Questions box



Two-question survey at the end



Webinar is recorded

 **Follow-up email sent tomorrow with link to slides & recording!**

# AGENDA

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- Importance of Measurement
- Leading vs. Lagging Indicators: Defined
- Lagging Indicators
- Leading Indicators
- Q&A



# POWER OF DATA



Gut feeling vs. Concrete data



Advantage of measurement driven safety



Convert safety from cost center to strategic asset

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# POWER OF DATA

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**WHAT GETS  
MEASURED,  
GETS  
MANAGED**



**Therefore,  
measure  
what  
matters.**

# WHAT KPI'S ARE RIGHT FOR YOU?

## Lagging Indicators

- **TRIR (Total Recordable Incident Rate)**
- **DART (Days Away, Restricted, or Transferred rate)**
- **LTIFR (Lost Time Injury Frequency Rate)**
- **SIF (Serious Injuries and Fatalities)**
- **OSHA Recordables**
- **Regulatory Citation/Fines**
- **Workers Comp Costs**

## Leading Indicators

- **Corrective Action Completion**
- **Employee Training Completion**
- **CAPAs (Corrective and Preventive Action)**
- **Near Misses Reported**
- **Safety Observations**
- **JHA Completions**
- **Toolbox Talks**
- **Equipment Breakdowns**
- **Worker Participation**

# IMPORTANCE OF MEASURING PERFORMANCE

**Measure What Matters** - Visibility into safety program effectiveness

**Spot Risks Early** - Identify issues before they escalate

**Prove the Value** - Show ROI of safety to leadership

**Stay Audit-Ready** - Ensure compliance through measurable performance

**Build Trust & Ownership** - Drive accountability across the organization

**Reactive vs. Proactive**

- *Reactive Costs*: Incidents, claims, fines, downtime, reputational damage
- *Proactive Gains*: Prevention, fewer incidents, higher morale, competitive edge

# LEADING VS. LAGGING INDICATORS: DEFINED



## Leading Indicators

- Metrics or inputs used to predict or influence future results
  - e.g. inspections and audits

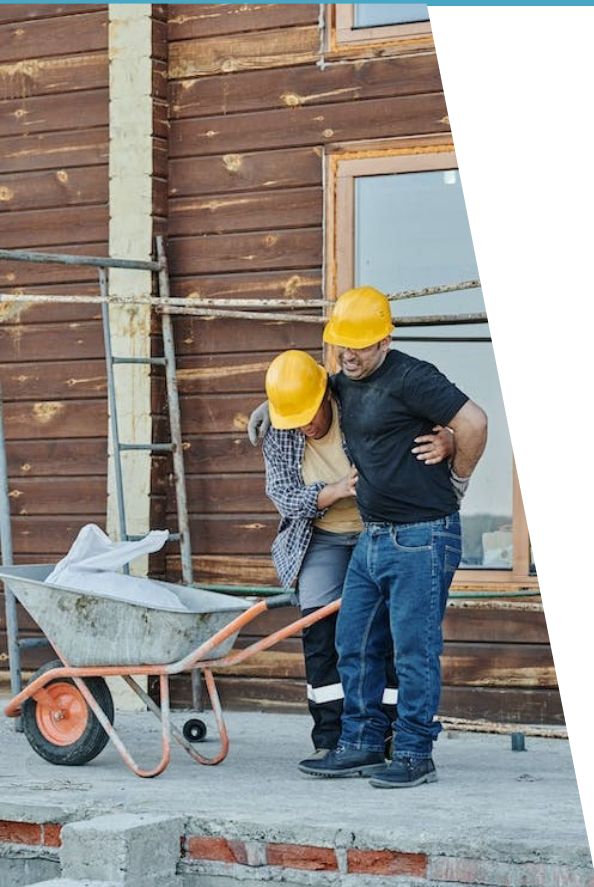


## Lagging Indicators

- Metrics that measure past performance
  - e.g. injury or incident rates



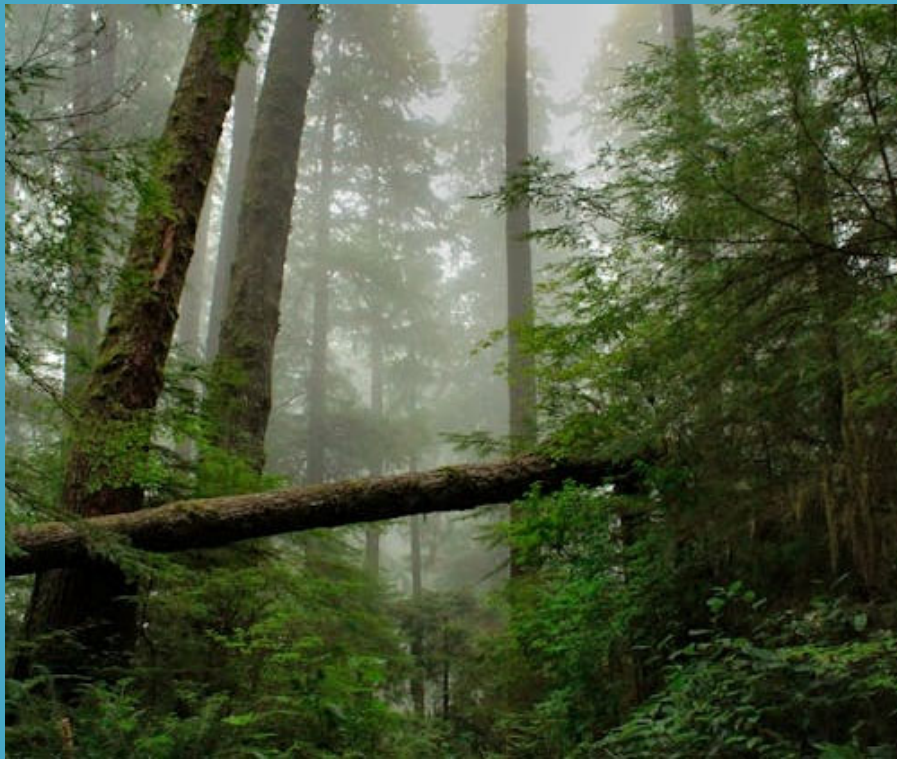
# LAGGING INDICATORS



- *Something* has already happened...
  - Injury incidents
  - Equipment failures
  - Missed deadlines
  - Service defects
- We cannot change the past, but we can learn from it
  - How can you use past performance to influence future performance?

# LAGGING INDICATORS

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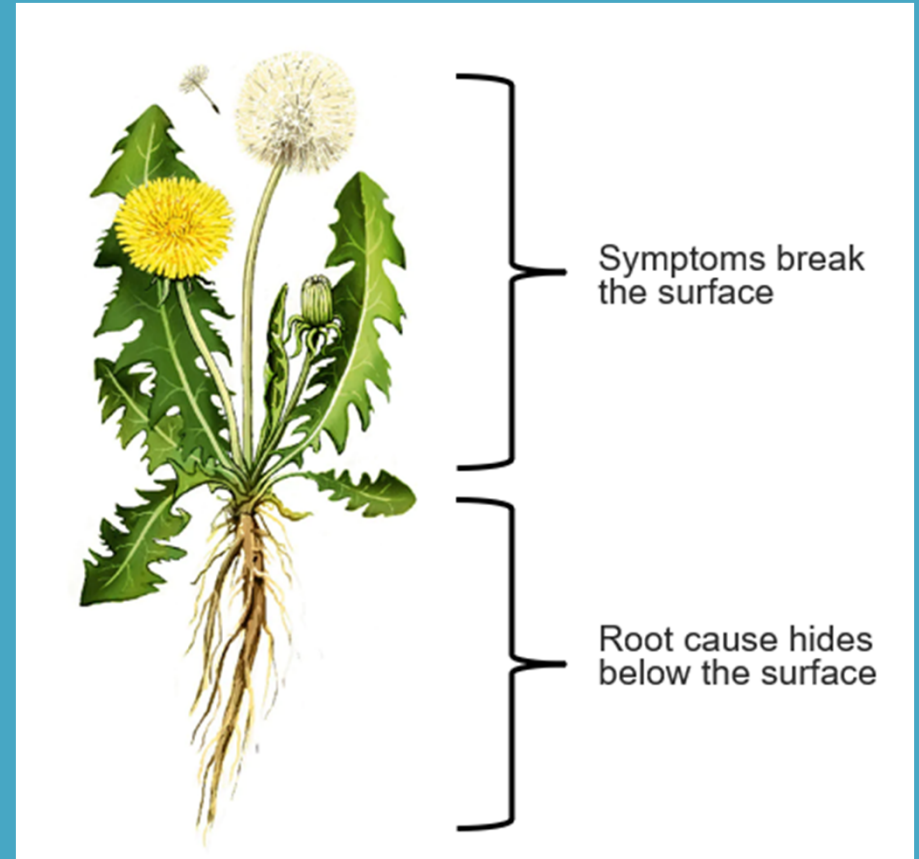
- If a tree falls in the woods...
- Do you have an injury reporting program?
- Do employees feel safe / comfortable reporting injuries?
- If injuries are not reported, we cannot learn from them

  
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# ROOT CAUSE ANALYSIS

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- Root Cause Analysis
  - Are you identifying the TRUE root cause?
  - The behavior is rarely the root cause
    - Conditions and situations often force or allow behaviors
  - “The Problem Weed”
    - The symptoms are evident
    - The true problem hides below the surface... You need to dig it up!



# ROOT CAUSE ANALYSIS

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- E.g. Nick slips on ice....
  - Why did Joe slip?
  - Why was there ice on the ground?
  - Why did the snow melt and refreeze
  - Why didn't we didn't we manage the ice?
  - Do we have a procedure for winter weather? What does it say?
- Keep asking "why" until you drill down to the root cause
  - A.k.a. the 5 Why Method for RCA
- Once you identify the *true* root cause, ensure there is a plan to prevent such conditions from existing in the future
- It could be next week, month, or year, but the problem will pop back up



# LAGGING INDICATORS

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- Collect and analyze data from past performance
- Identify clear trends
  - Incident types
  - Shift / hour of day
  - Employee tenure
  - Training completion
  - Job task or activity
- Implement actions with defined goals to address trends and impact future performance
- Assess effectiveness / impact of actions on a regular basis



# LAGGING INDICATORS: TRENDS AND ACTIONS

Example:

- Trend / Lagging Indicator
  - Seven slip/trip and fall injuries in 2022
  - 5 out of 7 (71%) were directly related to housekeeping
- Action / Leading Indicator
  - Implementation of a housekeeping program...
  - Daily facility walk by area managers with a checklist for high-risk areas, common hazards to watch out for
  - Review progress during monthly leadership meetings to ensure completion and quality



# LEADING INDICATORS

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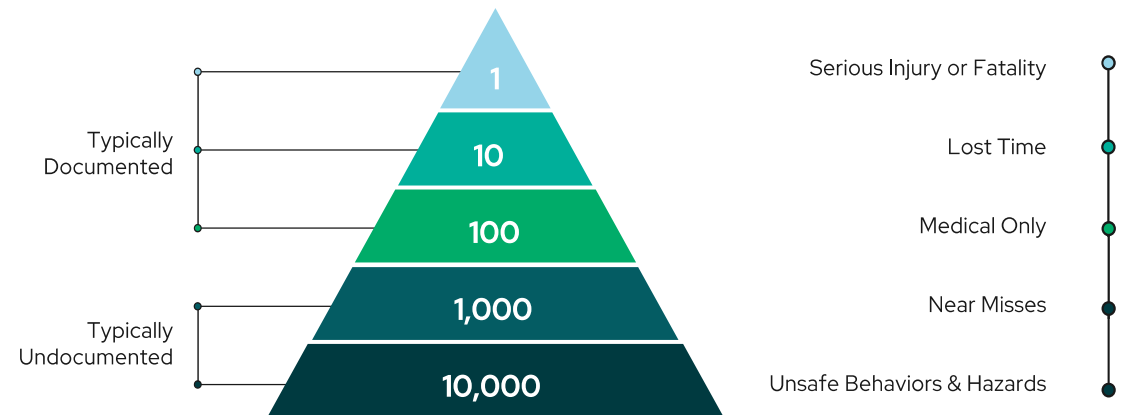


- Metrics that predict future performance
- Proactive measures to influence future performance
  - Safety observations
  - Employee safety reporting
  - Inspections
  - Audits
  - Training
  - Safety meetings
  - Preventative maintenance



# LEADING INDICATORS: NEAR MISS REPORTING

- “OSHA defines a near miss as an incident in which no property was damaged and no personal injury was sustained, but where, given a slight shift in time or position, damage or injury easily could have occurred.
- Near misses also may be referred to as **close calls, near accidents, accident precursors, injury-free events** and, in the case of moving objects, **near collisions.**”



# LEADING INDICATORS: NEAR MISS REPORTING

Leadership Commitment

Worker Participation

Effective Reporting System

Investigation and Analysis

Corrective Action and Communication



# LEADING INDICATORS: INSPECTIONS

- Inspections
  - A “face value” safety and/or compliance determination
  - Inspections focus on physical facilities, hazards, and controls
  - Questions/checklists may include:
    - Are all chemical containers labeled?
    - Are there any boxes blocking exit routes?
    - Is machinery well-maintained and properly guarded?
    - Are workers wearing all necessary personal protective equipment?
    - Is emergency equipment serviceable?
  - OSHA will require inspections for some equipment onsite
  - Conducted by managers, supervisors, foremen, and other on-site personnel

FIRE EXTINGUISHER			
REINSPECTION RECORD			
DATE	BY	DATE	BY

RECHARGE RECORD			
DATE	BY	DATE	BY

**HYDROSTATIC TEST RECORD**  
Date of Test \_\_\_\_ Test Pressure \_\_\_\_  
Tested By \_\_\_\_\_

EMERGENCY SHOWER & EYE WASH TEST RECORD			
INSPECT THIS UNIT CAREFULLY BEFORE SIGNING INSPECTION RECORD			
DATE	BY	DATE	BY

DO NOT REMOVE THIS TAG  
KPA 1000-0001-000-000

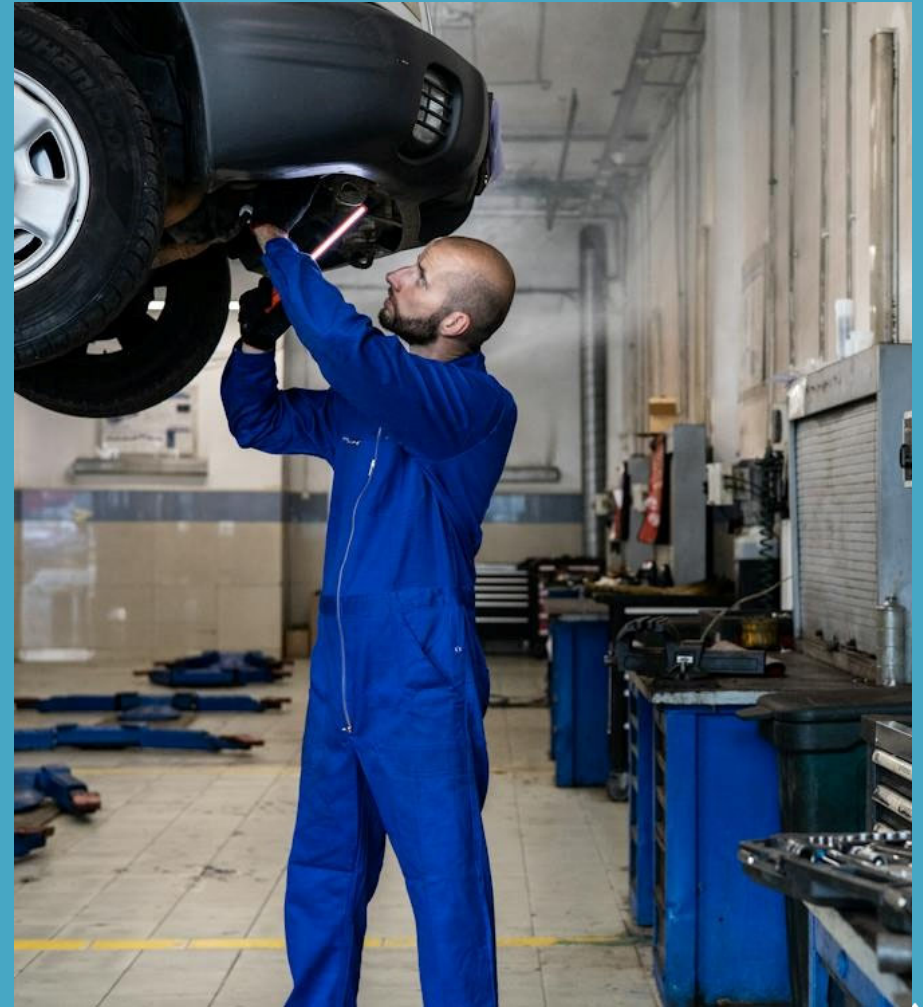


# LEADING INDICATORS: AUDITS

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- Audits are more in-depth and more system-focused than inspections
- Programs and policies need to be audited along with the facility itself
- Highly customizable - can be used to target specific trends
- "Trust but verify"
- Defects = Opportunity!

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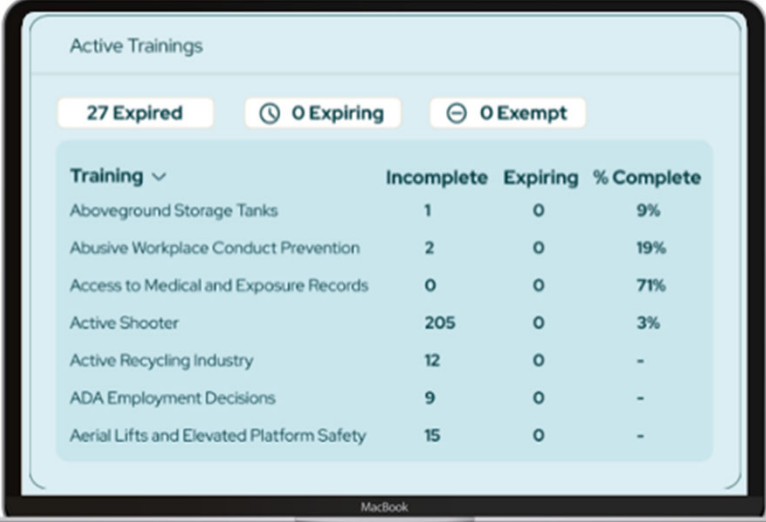


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# LEADING INDICATORS: SAFETY TRAINING

- Safety training is important
- Training completion
  - Positive leading indicator shows implementation levels of program
- Incomplete training
  - Use to evaluate risk
  - Could indicate knowledge gaps in workforce
- Retraining
  - Prioritize retraining based on regulatory requirements or identified trends



Training	Incomplete	Expiring	% Complete
Aboveground Storage Tanks	1	0	9%
Abusive Workplace Conduct Prevention	2	0	19%
Access to Medical and Exposure Records	0	0	71%
Active Shooter	205	0	3%
Active Recycling Industry	12	0	-
ADA Employment Decisions	9	0	-
Aerial Lifts and Elevated Platform Safety	15	0	-

# 6 STEPS FOR USING LEADING INDICATORS

1. Choose your indicator
2. Set a goal
3. Communicate the how and why
4. Collect data to measure progress
5. Assess
6. Review key learnings

***Measure what matters!***



# COMMON CHALLENGES & LESSONS LEARNED

**User adoption challenges:** Getting field workers comfortable with technology

**Data quality issues:** Ensuring consistent and accurate data collection

**Change management:** Overcoming resistance to new processes.

**Resource allocation:** Balancing implementation effort with daily operations

**Practical solutions:** Research within your industry for what worked for others

# KEY SUCCESS FACTORS

## Key Success Factors



**Predictive relationship:** Leading indicators inform lagging performance



**Use lagging data to refine leading strategies:** Analyze incident data to identify which leading indicators to emphasize



**Leadership commitment:** Visible support and resource allocation



**Clear communication:** Explaining the "why" behind measurement



**Training and support:** Ensuring users understand tools and processes



**Start small:** Pilot approach with gradual expansion



**Regular review:** Continuous evaluation and adjustment



**Celebrate wins:** Recognizing improvements and successes

# QUESTIONS?



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# UPCOMING WEBINARS

Employer Essentials



Watch your inbox  
for invitations

Thursday, Sept. 25 | 11:00 a.m. to 12:00 p.m.

**When Standard Coverage Isn't Enough:** The Case for Umbrella & Excess Liability

Thursday, October 2 | 11:00 a.m. to 12:00 p.m.

**Navigating Open Enrollment:** A Step-by-Step Guide for Employers

Thursday, October 23 | 11:00 a.m. to 12:00 p.m.

**Workplace Privacy:** Employee Monitoring & Data Protection