



## Tracking Leading Indicators Can Influence Incident Frequency

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With safety paramount in tree management, for 2014 The Davey Tree Expert Company chose three leading indicators to focus on in order to improve safe productivity: (1) job observations; (2) close-call communications; and (3) effective job briefings.

Davey safety experts are logging information on all three leading indicators and tracking the results. Through analysis of the data, Davey hopes to successfully lower the frequency of safety incidents and deficiencies in the field.

### Charting Job Observations Electronically

In Michigan, Davey foremen working on the DTE Energy Co. account started compiling electronic data from job observations in August 2013. Davey Tree Area Manager John Tokarczyk used Pareto charts (a combined bar and line graph) to track the monthly frequency of deficiencies marked on job observation reports.

“When we did that, we were able to figure out the percentage of each deficiency and what percentage of the reports had that deficiency on them,” Tokarczyk said. “So it’s allowed us to identify the main deficiency, where we need to

concentrate, from month to month. And then it’s allowed us to follow trends so we can celebrate our successes but also note if we see something going the wrong way.”

For example, Davey job observation reports contain five boxes so general foremen can note if there’s an issue with vehicle equipment safety, worksite setup, electrical hazards, work procedures or other general concerns. Via the Pareto charts, Tokarczyk can note how many deficiencies are marked for each of the five categories and determine which category has the highest percentage of issues.

Tokarczyk shares the data quarterly with DTE Energy and monthly with Davey general foremen, who then inform their crews about trends, which deficiencies are most prevalent and how to reduce them.

### Close-Call Communications

Before this year, Davey encouraged informal close-call communication among crews to talk about a day’s close

calls and ways to avoid them. In April, Davey rolled out a formalized Close-Call Communicator program in which crew members can report close calls anonymously via a report to their supervisors, who then can share the close call communication on a regional level.

Johnny Wilson, manager in field safety support at Davey, said in just a few months he’s heard more close-call reports than ever before.

“As we move forward with the Communicator, and our employees get more comfortable talking about close calls, we will see this as one of the best tools we have in preventing an incident from taking place,” Wilson said.

### Job Briefings

Effective job briefings are critical for crews to identify hazards, exposures to the hazards and potential obstacles on the job site and for developing and implementing effective plans to safely complete the work.

Joe Engberg, manager in safety program support at Davey, said clear and detailed job briefings are a good indicator of how safe a jobsite will be.

“Lack of an effective job briefing is an error precursor, which is a condition that makes errors more likely,” Engberg said. “If our crew leaders and crews are doing effective job briefings, that’s an indicator we can track in the job observation process. We can then look for correlations between effective job briefings and our incident frequency.”

### Crafting Safety Policy

In the end, the goal of tracking leading indicator data is to prevent incidents on the job. And one way that may be done is by using data gathered at the regional and local level to craft national safety policies and work procedures for Davey employees.

Engberg said commonalities in deficiencies or successes from site to site may indicate there is a systemic issue that needs to be addressed or a leading indicator, such as effective job briefings, that Davey can correlate to success.

“It may be a territory, region or service line procedure that needs to be addressed,” Engberg said. “The idea is for our managers and supervisors to participate in the process. If they see the same issues, we need to be looking at our systems and procedures as well as the behaviors of the individuals on our job sites.”

