

# Trending: Use of Performance Metrics and Trend Results for Continuous Improvement

Do you use performance metrics to monitor your safety and occupational health management system (SOHMS)? Did you identify any trends? Now what? This one pager outlines several ways to help drive improvement in your SOHMS using your performance data and trends.

## INVESTIGATE TRENDS AND DEVELOP CORRECTIVE ACTION PLANS

You put in the effort to capture performance metrics and identify your SOHMS trends. Time for action to review your trends, looking for signs of inefficient or ineffective processes and try to determine the causal factors why the processes are inefficient or ineffective. Investigate your trends to pinpoint specific process steps contributing to the trends, and then development of corrective action plans. Identify any corrective action items you can take to improve the trend. Developing improvements based on your analysis and subsequently revisiting the resulting specific process step trends will improve the overall effectiveness of your processes.

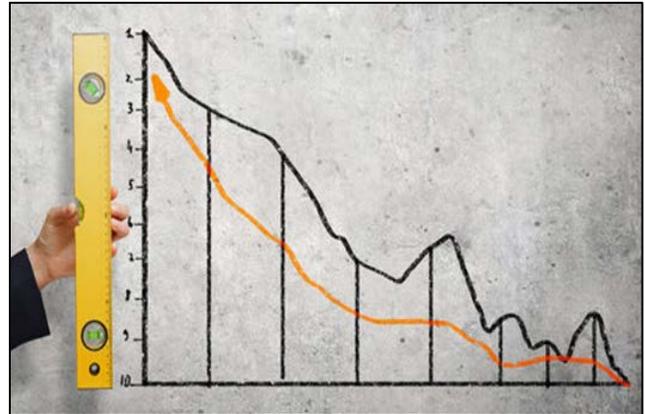


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Corrective actions may include reallocating resources, assigning or changing responsibilities, or planning additional training. Involve your employees when developing and establishing trends-based improvement actions to gain different employee insights and include their perspective.

Track causal factors and corrective actions as you would safety and health (S&H) hazards by assigning responsible persons and setting target dates for completion. After incorporating improvements, observe performance results and trends to determine the effectiveness of the corrective actions.

## PRIORITIZE YOUR TRENDS



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Trends don't carry the same level of risk. You need to prioritize the actions from least to most significant. Assess the risk posed by a specific trend, the amount of effort or resources required to address the improvement, or the parts of your SOHMS requiring the most improvement.

Consider using your S&H committee to help prioritize the needed improvements identified through your trends.

## DEVELOP A TREND REPORT

Never let your trends speak for themselves. Prepare a trend report describing the data monitored, outlining identified trends, and detailing why they are good or bad for your SOHMS. Use a combination of text and visual aids to discuss and display trend data. Summarize all data gathered, resulting trends and improvements needed.

## BRIEF LEADERSHIP

Share trend reports with leadership and brief them on all identified trends and the improvements the SOHMS needs. Ask them to help initiate action or changes within your organization. Ensure leadership understands the identified and the actions needed for improvement. Inform leaders of ideas to create new goals and objectives to address key improvements.



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## DRAFT NEW S&H GOALS AND OBJECTIVES

Use the identified improvement opportunities identified from your most significant trends to help establish new annual S&H goals and objectives. Using your trends ensures greater focus and emphasis on making specific improvements across the organization.

Establish your goals and create actionable objectives outlining how you will accomplish the goal. Consider using your S&H committee to identify the best goals and objectives to drive continuous improvement in your SMS. Assign responsible persons to monitor progress periodically. Ensure your goals and objectives follow the [SMART model](#).



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## COMMUNICATE TRENDS AND ACTION PLANS

Communicate your trends, inefficiencies, corrective actions, and new S&H goals and objectives to affected employees (e.g., workers, key stakeholders involved in trend analysis or SMS improvements, person(s) assigned corrective action items).

For example, you identify a trend of failing to conduct industrial hygiene (IH) monitoring as scheduled. Communicate this trend to leadership and supervisors. Ensure supervisors understand it is their responsibility to notify IH personnel when planning a process requiring IH monitoring, so the IH personnel can schedule the assessment.

Use different communication methods to convey trend information (e.g., postings on S&H bulletin boards, presentations delivered organization-wide, one-on-one meetings with key stakeholders, flyers, emails, etc.). Ensure all workers are capable of reading and understanding the information provided.

For additional information on the SMCX's services, please visit the SMCX-hosted website at: <https://www.smscx.org/>.



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