LEADING THOUGHTS

Leading Safety From Within
TRAINING INTERNAL SAFETY CATALYSTS

By Robert Pater

Where does the drive for safety best spring from? Certainly, top management commitment and support are critical. But many safety leaders also indicate that interest and ultimate impetus for safety are most effective when impelled from within each individual in day-to-day work.

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Where everyone—including line and office staff, supervisors, managers and executives—willingly embraces safety's crucial importance and wholeheartedly self-directs applying best perception, decisions and actions.

I heartily agree. And further, consider that internal safety is more than just what goes on within individuals. It is inside organizations as well, when they carefully create a foundation and structure that strongly supports safety. This organizational mindset is one of the hallmarks of a stellar safety culture where mindsets and actions are internalized, even when people know that no one else is watching, and even applying to what people do off work (see Pater, 2012). As in, to what degree does the company embolden internal motivation (vs. carrot-and-sticking), develop current employees, promote from within, recognize and encourage alternative safer approaches, pilot different methods that have potential to elevate safety, or encourage greater worker-to-manager as well as peer-to-peer safety communications?

How can leaders step up to a higher level? One tried and true way that is not nearly as prevalent as it might be is where organizations better actuate and support safety from within by developing and deploying a chosen cadre of internal safety catalysts. These can be comprised of 1. selected workers who are motivated and capable of training peers, informally coaching and reinforcing safety messaging and methods; 2. other safety leaders; 3. select supervisors; and 4. OSH and other professionals who can do the same. These latter groups can also serve to support worker safety catalysts, who may have less formal education or training experience. While ideally, selected workers form most catalysts, all of them focus on transferring improved safety techniques, communicating and supporting how best to employ new equipment, eliciting then effectively responding to questions and concerns.

Training internal safety catalysts employs the principle of scissors leadership (see Pater, 2016a). Think of it this way: The most efficient way to cut through thick cardboard isn't by cutting downward with a knife or by slicing up from the underside. It's both, employing two knives coming together: scissors. This is analogous to cutting through blockages to improvement, simultaneously shearing through obstacles to higher safety performance both top down (driven by active management leadership) and bottom up (grassroots led).

But because so many companies in my experience have been more conscious and diligent about securing top management support, they can reap significant gains by rebalancing. One proven way is by structuring in internal safety catalysts, a highly effective method for elevating performance and culture from the bottom up.

Catalyzing Safety Culture & Performance From Within: From Purpose to Eight Benefits

The purpose of this article is to provide some food for thought for strategy and planning; encourage those who haven't yet trained internal resources to consider doing so; and, for those planning on instituting this, to shortcut some of the early learning curves (or false steps) that many companies make in training internal catalysts. If you've tried but haven't gotten the results you wanted from such a process, I'll suggest how to make tweaks that upgrade your approach.

We call such change agents catalysts, akin to a catalyst in chemistry, a substance that either makes reactions occur that otherwise wouldn't or significantly accelerates slow-moving change. In both molecular reactions and in organizational leadership, catalysts ultimately help transformations occur by lowering the activation energy required to create a reaction. In addition to sparking initial change, organizational safety catalysts serve to overcome the entropy of regression to sustain and further improvements.

Such safety catalysts accomplish this by bringing others together, then aligning them toward a common purpose to amplify mindfulness, heighten communications and teamwork, improve decisions, and transfer and support safer actions.

This comes from much more than theory or wishful thinking: Over almost 4 decades, we've trained more than 22,000 internal safety catalysts—line workers, select supervisors, safety and health professionals, even managers—in a wide array of organizations globally to become forces for injury prevention and cultural improvement. Here's some of what we've found:

Consider eight benefits of training internal safety trainers, change agents or catalysts:

1. Ongoingly engender upgraded safety mindsets and transfer skill sets within the company.

2. Ease of scheduling; not having to rely on the availability of outside resources that also must be expensed.

3. Provide flexibility (e.g., to reach those who missed initial training due to absence or inability to be released from work tasks). Internal safety

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catalysts are also in place to onboard new hires or temporary workers, whether individually or in groups of varying sizes and compositions.

4. Efficient time usage. Generally, grassroots safety catalysts have more time to share, listen and influence than do those in higher positions (e.g., safety professionals, managers). Catalysts can serve as supports to highly busy supervisors. Often catalyst or peer interactions occur informally in break rooms, before meetings begin, while working alongside one another, even in the parking lot. In many cases, these are times when some are actually more open to influence.

5. Develop workers as resources, both to further retention and for expanded organizational capability. Where many companies increasingly strive to retain valued workers, developing select workers as catalysts can be a rewarding and challenging opportunity, while also increasing their ability to expand their contributions to the company. For example, several clients have utilized safety catalysts trained in our system for soft-tissue injury reduction to also help set leading ergonomic indicators as well as to provide input for proposed tool redesigns or potential new equipment purchases from a different, complementary perspective than ergonomists.

6. Spread safety's base, offloading and supporting busy safety professionals and supervisors. "It was like we added 14 people to the safety office," Ranae Adee remarked when she was the EHS director of Pfizer Consumer Healthcare after training catalysts resulted in significant leading and trailing indicator improvements. Especially when many organizations may be having difficulty fully staffing their safety function, one of the ways companies can strengthen safety messaging and reinforcement is to develop internal resources that effectively become deputies of change. Catalysts can also effectively support safety staff who rotate between sites or who predominantly operate away from where workers perform tasks. Saturation of safety mindsets and skill sets is a key element in the highest-level cultures. Committed and trained catalysts can further this.

7. Readily reinforce newly transferred skill sets. Consider, cumulative improvement is necessary to undo and prevent cumulative trauma. Ongoing improvements in decision-making, mindfulness and safer actions rarely come from a one-shot exposure. This is why, when it comes to preventing injuries that have cumulative rather than predominantly acute contributors such as soft-tissue/sprains/strains, it's especially essential to go beyond a traditional mainly one-and-done model, whether in training, one-on-one performance reviews, bulletins, postings or email directives.

Because small actions can build into hampering injuries, it's essential to help people move above and beyond their default "always done it this way" habits that could otherwise fly below the at-risk radar. For example, have you heard of or experienced a strain or sprain whose precipitating cause was either "I didn't do anything," or from some activity that person had previously done hundreds or more times, seemingly without incident? Activities such as picking up a piece of paper off the floor, bending over to tie their shoes, reaching out to grab a tool or turn on a switch, slightly turning to look, or just getting up out of a chair? Providing multiple exposures to new and improved safety methods and techniques is essential for effectively breaking through the worn-down rut of such cumulative trauma disorders.

Having internal catalysts who are able and present to keep alive, attentionally renew, refresh, remind as well as elicit, then respond to questions is a powerful organizational approach to raising the baseline of decisions and actions, making it more likely that others will remember and apply preventive methods. Because safety catalysts often work alongside peers, they can easily reinforce improvements ongoingly after initial training at toolbox meetings, monthly safety meetings, informal conversations (where real mindset change often happens), coaching, making videos for reinforcement, giving input into purchasing, and more.

8. Upgrade the hidden safety culture. As colleague and change-master Paul McClellan remarks, "The real safety culture is not the one that most managers see." Paul, who has trained more than 15,000 internal safety catalysts for a wide array of companies, was referring to those actual everyday decisions and actions that aren't sanitized, covered over or self-consciously displayed when workers know that leaders come around to observe.

Internal safety catalysts serve to help move their organization up the four levels of safety culture, from Level 1, forced culture, where safety is done *to* workers, to Level 2, protective culture, where safety is benevolently done *for* workers, to Level 3, involved culture, where safety is done *with* workers, to Level 4, internalized culture, where safety is done *by* workers for themselves (Pater, 2012).

Changing the hidden safety culture entails first upgrading others' beliefs in what can possibly and realistically happen within the company, second, how they approach tasks and what they decide to do, third, elevating their skills, and fourth, ultimately changing actions to more safely accomplish tasks. Catalysts can make sizable strides in each of these arenas.

Objectives Simultaneously

Strategically, potential attractive benefits can be readily transformed into practical objectives. In other words, moving from what appeals to what to aim for. Consider the eight benefits noted, add others that are important and relevant, then select a few from those as company-specific objectives. Then choose and home in on the two to three highest priorities, not biting off too many at once.

It is also important to plan how to simultaneously intersect these objectives. That is, to realize multiple results with one action. For example, rather than developing and implementing three different initiatives, one to elevate safer actions, a second to boost worker engagement and a third to augment operational productivity, strategic leaders instead plan for one approach for propelling all three at the

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same time. Like lining up three targets, one behind the other, and shooting an arrow that can penetrate the bull's-eye of each one. In this case, developing internal safety catalysts can elevate safer decisions, actions and organizational culture together. While this simultaneous thinking approach requires more up-front thought and planning, it can easily deliver greater rewards, more efficiently over a short span.

Sample objectives might include:

1. Sustaining and growing significant reductions in injuries. When they train and reinforce peers, safety catalysts are typically more knowledgeable about specific tasks and have credibility from having done similar work tasks. They may, therefore, be best placed to show specific worksite applications of new safety methods, techniques and tools.

2. Energizing safety. Catalysts can attest to their own and others' personal returns from safety methods.

3. Boosting engagement. Elevate acceptance, reduce pushback and resistance. Heighten recognition, unearthing and acknowledging otherwise unseen positive safety actions by peers. And the very approach of developing select workers as catalysts emblemize a process of engagement.

4. Encouraging more of an internal focus, what industrial psychologists term an internal locus of control (in stark contrast to people believing that outside forces are responsible for incidents and other negative events that happen to them).

Implementation Lessons From the Corporate Field: Dos & Don'ts

Here are several keys points we've found from more than 35 years of training internal safety catalysts:

1. It's selection, selection, selection. Choosing the right people is critical for making the right differences. But there are some key don'ts to avoid:

•Don't select safety catalysts to teach them a lesson (we've seen this way too many times, where someone who has been injured from "not paying attention" is punished by being thrust unwillingly into a catalyst role).

•Don't only choose the shining stars, the always positive people or "goody-goodies" as possible catalysts (who may not have the highest credibility with peers).

•On the opposite pole, avoid those who are counting down their time until retirement or to jump ship. Avoid volunteering those who are "retired on active duty" or are so disengaged they have given up on believing there is any hope for positive changes within the company.

•Equally, you might pass on those who are going through significant life stress (e.g., divorce) that might distract them from a catalyst mission.

•Don't only select those who've had previous presentation experience. We have seen some who had never previously been in front of groups turn into star change agents.

•Avoid selecting those who are basically the same: all from the same shift (so there's limited coverage), same age range, or same gender. Go for a representative cross section.

A few dos to consider:

•Do invite in those who have credibility with peers, even if their credibility is of the complaining or negative ilk. In fact, time and again, we have found that adamant resisters often turn around when treated honestly and with respect, becoming highly effective peer catalysts. And there is an additional benefit to selecting people as prospective catalysts who have previously been adamantly negative: when they turn around, the credibility of safety elevates as peers notice this ("What happened to Jim? He was always complaining; now he wants to help us and he's got some ideas").

•Do look to select those who have expressed real concerns about safety and seemingly want to make a difference.

•Do saturate sufficiently. Remember that catalysts' role goes beyond initially exposing others to new safety techniques or tools. It includes activating their interest, then reinforcing use of new methods. It's a too-common pennywise-and-pound-foolish misstep for companies to train too few catalysts. Think of developing enough so there is coverage on all work shifts and across different kinds of workers (e.g., make sure to include representative people from worker subgroups who speak other languages).

Saturation is like raising the blood level of a medication to a high enough degree to get best results. Bear in mind that, especially in the beginning, a catalyst will tend to be more effective (and tend to stick) when it is not just them individually, but where they have other similarly prepared catalysts for mutual support and to display a sufficient presence.

2. Be sure to positively set catalyst expectations before, during and after they train others. Check in with them regularly to inquire what went well or if there were any glitches. What you give your attention to is what you get. Everything from relationships to mechanical objects must be maintained or risk becoming dysfunctional; if leaders want strong, effective catalysts, they, like all that is valued, must be sincerely and adequately attended to and kept up. And having an executive drop in during catalysts' training, even saying a few words conveying the importance of their mission, also sends a powerful message about the value of their upcoming role.

3. Think and go well beyond just content. Many companies fall here: Bear in mind that catalysts must become self-convinced before they can effectively imprint on others the importance of new safety techniques, tools and procedures. It is intrinsic to the process of communicating persuasively.

4. Prepare catalysts to an even greater degree than just what they will initially present so they are ready and confident to answer unexpected questions or challenges they will likely receive. If you want the bulk of your population to be trained up to a Level C in safety knowledge and skills, the catalysts you prepare have to themselves be at Level L or M. This is so they have a buffer, knowing more than just the bare bones of what they are going to present. Such preparation promotes confidence in the catalysts, which is another key in their being persuasive.

5. Allow sufficient time during catalyst training for information and methods to become assimilated and so that they can practice presenting and coaching. A general rule: If you want someone to be able to do something after training, they must do this, or something close to it, during training.

6. Plan for rollout sooner rather than later. Arrange in advance for catalysts to break the ice, presenting soon after their training, when their own information retention and motivation are most fresh.

7. Consider segmenting their roles. We have found that some catalysts are more comfortable doing one-on-one-coaching, others in presenting to small groups, some in training larger groups and others previewing training to managers and executives. We have found it best to poll new catalysts about their initial interest and comfort levels, then initially matching them up. Frequently, after they become more comfortable, many catalysts have shown willingness to expand their roles.

8. Logistically support these supporters. After having invested time and resources into catalysts, it is essential for their continued motivation and effectiveness to have needed background logistical support. Alternately, change-master Craig Lewis (who has trained more than 10,000 internal safety catalysts) relates that he has seen situations where formerly highly motivated catalysts became disillusioned when simple support was lacking, such as when they tried to get into a room that was scheduled for training, but the door was locked and no one had the key. Or when supervisors wouldn't release participants at their scheduled training time.

Think of the phrase, "For want of a nail, the war was lost." Don't let this happen. Consider arranging release time for catalysts to prepare for their training and to informally coach peers. Make it easy for them to succeed (e.g., not asking them to present to too large a group at first, not directing them to unreasonably cut down their training time beyond where they can be effective). Make sure simple logistics are taken care of (e.g., participants are cleared to attend) and schedule them at times that are mutually acceptable (e.g., not expecting them to forgo a planned vacation).

9. Recruit and support an executive sponsor who believes in and in turn supports the catalyst process. While optional, this can be extremely helpful for cutting through bureaucratic barriers to resources that catalysts need and can broadcast strong messages of organizational support.

Catalyzing Combined Significant Safety Performance & Culture

An either-and approach to significant safety cultural step-change is more efficient and effective than an either-or approach. In other words, combining top-down, management-led safety along with a strategic bottom-up, grassroots-driven safety catalyst system is a powerful approach for generating eye-popping results on many levels. Scissors-like, these two tools best go hand in hand toward workers truly becoming engaged in and excited about safety, elevating decisions and actions that last, and elevating safety communications that focus on realistic solutions, rather than finger-pointing.

It's almost magical. From decades of experience, I cannot emphasize enough how internalizing safety within a company by selecting, preparing and supporting catalysts can unlock many levels of performance. By tapping into and refining the already existing potential of a range of its members, organizations can create an in-place mechanism for helping all their people live and work safer, more effectively, more productively and maintain their interest and commitment in surprising ways. **PSJ**

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