

## Case Study 15: Anonymous – Oil & Gas Services

Keywords: Safety Culture / Program Design / Training / Hazardous environments / Other Organizations

For this study, “other organizations” are defined as organizations that do not fit in the other three categories (Transit, Trucking and Safety Organizations). The definition included organizations employing other types of professional drivers, as well as employees who drive for their work, but who are not professional drivers. Examples from the “Other Organizations” category can be helpful for all organizations who have the freedom and/or the need to implement new and creative ideas. They may also be helpful for those organizations who are growing and want to think outside the “standard safe driving” box to customizable proactive safety programs.

*This example is a company that provides on-site oil and gas services with a diverse and specialized fleet of 1400 light to medium duty vehicles and 300 heavy specialized vehicles, and approximately 2200 employees. Driver safety programs are part of an Agency Management Systems (AMS) approach which focuses on continuous improvement and monitoring all aspects of safety, including driver safety. The emphasis is on the whole life application promulgated at both the corporate and field office locations.*

*Driver safety is recognized as unique among safety areas in that there is a known predisposition to underestimate the risks and over-estimate one’s ability to avoid those risks, plus it is present at home (aka off the job). The majority of the hazards and safety issues are NOT common to everyday life.*

*Safety Culture: The current AMS initiative resulted from a 2012 survey of company attitudes and practice. The result was the creation of an extensive organizational structure involving the formation of a hierarchy of health, environment and safety (HES) focused committees. There are quarterly HES board meetings to review the corporate safety goals. This committee is supported by a corporate Management Committee to deal with safety programs in the various safety areas. This is in turn supported by the HES Committee of operations staff which provides feedback from monthly meetings at the various field offices and sites.*

*Within this last level are various safety area sub-committees, one of which is the driving safety subcommittee. This committee oversees the attainment of the annual goals for “local level assets” such as drilling, field service, etc., each of which has its own safety groups. This extensive hierarchical organizational structure promotes the priorities of engagement and everyday awareness of safety.*

*Common Programs (corporate-wide driving safety programs common to all employees): The driver safety programs are all predicated on a philosophy / strategy focused on behavior observation (monitoring, pre-departure inspections, and incident, area or individual targeted training).*

*Of particular interest is the Driving Safety Analysis (DSA). This program is a spin-off of a broader safety program called Job Safety Analysis. It originated in one of the fracking business units acquired by the company. It was designed to address the specific challenges of large specialized vehicles that remain on-site for extended periods and then must be restored to vehicle configuration / street-legal status to move to the next site. The program involved a physical Scan vehicle, Scan area, Journey management and Arrival planning sequence. This basic protocol was adapted to the entire fleet by the company, based on the obvious merits of a full 360 walk around (vehicle and area) and the equally obvious reduction of incidents attributed to its use. (Anecdote: "Becomes over-kill when applied too literally to lighter duty vehicles.")*

*In-vehicle Monitoring: GeoTab is used for in-vehicle and external conditions monitoring. It is used in-vehicle primarily as a coaching tool to guide driver behavior. Externally, it provides information about contributing conditions and extenuating circumstances (e.g., bad roads causing vehicle movement alerts / incidents). There is an on-going effort to use this information (external and in-vehicle) to develop predictive models of risk and/or incident.*

*Site Training (On-site field location defensive driving): The content of this program, as well as the delivery protocol is explicitly based on cognitive brain science theory! The program involves 1.5 hours of classroom training and a risk "assessment drive" based on the company's SAFER system (Search, Assess, Formulate, Execute, Reflect). The objective of this training is to develop skills in assessing hazards. The "assessment drive" involves a verbal talk-through during the actual drive, vocalizing the driver's analytical thought process during the drive. The program, and especially this element of the program was developed internally, but is based on a similar element of the Smith System called a "commentary drive". The configuration and application / delivery method is explicitly attributed to cognitive psychology theory. The risk assessment drive has three steps identify hazards – assess the risk – make a plan. While no formal metrics are collected, anecdotal evidence claims that stopping time has been reduced measurably (by 1-2 seconds).*

*A link to personal / off the job behavior is claimed for this approach vis a vis the fundamental change this approach fosters in thinking as well as behavior. Reinforced / supplemented by the behavioral impact of the in-vehicle monitors, the in-vehicle and site training element are believed to transfer (spill over into) beyond personal life to other family members! Public elements of the safety program specifically address the extension of safety awareness to all on life (e.g., rules to live by R2LB and the "8760" campaign for the number of hours in a calendar year).*

*These "core" programs are required of all employees that drive corporate vehicles. Virtually everybody, including those whose jobs are primarily driving and who are required to have a CDL. CDL certification is not provided by the company. Positions requiring a CDL are filled by applicants already having a CDL. There is supplementary training required of CDL holders relating to regulatory compliance, the specifics of the company's operating environment and safety culture (driving and other elements).*

*Metrics & Assessment: The connection between incidents and the safety programs is recognized but is seen as loose and complex. The safety program is very holistic and the individual elements are seen as inseparable. However, individual compliance is monitored and tracked. Incidents are tracked and categorized by type and used to modify the environment (e.g., repave access roads in response to hard maneuver incidents), retrain (in response to either individual or group non-compliance), or modify / refine program content or delivery.*

*There is also field level assessment of program effectiveness in the form of “leveraging behavioral observations.” This is a field level assessment of compliance based on the earlier SAFER protocol, used to upgrade the existing program content and/or delivery. There is no Go/No Go program evaluation and continuity is a valuable (even critical) asset to the effectiveness of the whole program. Safety training is broadly general in focus rather than aimed at specific quantitative guidelines (e.g., in the rain slow down by 10 mph).*

*Training is provided at area field locations by a few dedicated staff. Otherwise, HES staff (“a handful”) provide the classroom training, along with four evaluators for the risk assessment drive. The “risk assessment drive” portion of the training is provided by line supervisors (Foremen). Aside from the obvious staffing advantage, this is seen as leveraging the credibility of these senior line managers, thus encouraging engagement and making the training more credible and therefore more effective.*

*Finally, there are general “driving safety policies”, along with the usual background checks. However, these are seen as obvious and not a part of the safety program.*

#### Comments & Takeaways

- The concept of an assessment drive with a real time talk through as it is happening.
- Rewards (e.g., hats and well-done points) as public recognition for safe behavior pays for itself in savings, while also reinforcing safe behavior.
- A safety culture that permeates everything and includes quarterly safety board meetings. Safety publically top down and everyone participates, even those who don't drive.
- A full 360-walk around similar to pilots pre-checking their aircraft before flight... Recognition that special vehicles need special attention, it also acknowledges that visual inspections by individuals matter and find things.
- Having managers who can drive run the risk assessment drive. This credibility and signifies the importance of safety to newly hired drivers.