

## Increasing “Near-Miss” Reporting Creates a Safer Refinery

### The Client’s Situation

An oil refinery is an immense, intricate maze of piping filled with steam or flammable fluids, run by hundreds of workers. In this hazardous environment, it is essential to be aware of near-misses—close calls where a mistake, noncompliance, or inattention did not cause an accident, but could have. Examples are a valve being inadvertently left open or shut, a ladder not being balanced, or traffic violations.

A Fortune 10 energy company was concerned about unusually low near-miss reporting in one of its largest refineries. A facility its size normally experiences 80 or more near-misses monthly. But reporting at the refinery was very low, averaging around 10.

There was a good reason. If a worker knew about a near-miss incident, it implied that he/she might have been involved, or even responsible for it. This risked disciplinary action. Thus, refinery workers were reluctant to report them. But when a near-miss is reported, everyone learns from it. Managers wanted reporting to be viewed as positive for the entire facility, not as a mark against an individual.

### CLG’s Solution

CLG’s team applied the **Performance Catalyst®** process to identify **High-Impact Behaviors<sup>SM</sup>** and who performs them (Key Performers) to achieve the Targeted Result—in this case, improved near-miss reporting. This assessment resulted in a Coaching Action Plan, which specified who must perform what behaviors to get consistent performance.

Working with refinery managers, CLG’s consultants:

- Identified behaviors that drive near-miss reporting
- Coached front-line supervisors in encouraging crew members to spot near-misses and submit reports
- Gave positive feedback to employees who reported near-misses
- Shared the resulting near-miss database with crews
- Monitored and reported behaviors related to near-miss reporting to senior managers
- Tracked safety improvement action items from near-miss reports to ensure continued attention and awareness
- Reinforced the quality of reports by sharing them in safety meetings



*At one of America’s largest oil refineries, CLG’s **Performance Catalyst®** process changed people’s behavior, resulting in much-improved reporting of “near-miss” incidents — and improved safety overall.*

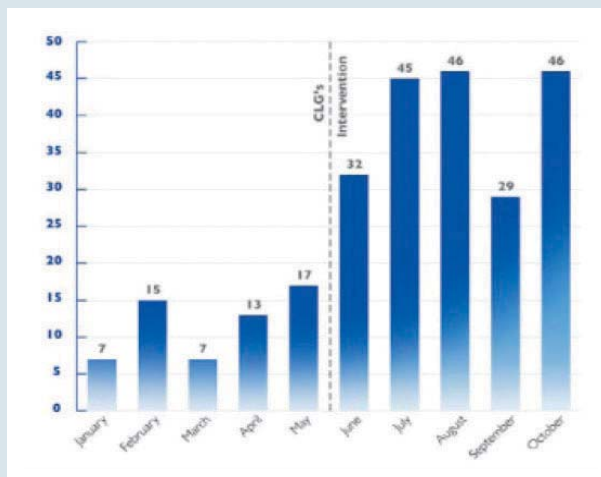
Shift leaders constantly signaled the importance of near-misses by prompting discussions, identifying reporting opportunities, and highlighting the relationship between reporting and overall safety.

Near-miss reporting won strong endorsement throughout the refinery. The rule became: if you see a near-miss, write it up. This made it visible to everyone so others could learn from it. Refinery managers instilled in employees that reporting is always good; it is a platform for safety and a responsibility of everyone.

### Results of CLG's Intervention

Over the first few months, near-miss reports jumped from an average of 10 per month to 30–50. This increase helped to reduce actual incidents and injuries.

Near-Miss Reports Submitted by Month



Today, shift leaders routinely share near-miss reports with crews, which have become a staple of plant safety meetings. The Coaching Action Plan for near-miss reporting is now recognized as an important element in improving safety.

*Results over the first few months showed the refinery recorded between 30 and 50 near-miss reports each month, up from only 10. While there is still room for improvement, the refinery has shown a significant increase in safety awareness.*

### About CLG

CLG is a worldwide leader of behavior-based strategy execution and performance improvement consulting that enables companies to achieve lasting results consistently, with speed, precision, and control.

Whether your goal is increased growth, reduced costs, better asset utilization, higher customer satisfaction, better use of technology, or overall culture change, CLG can customize a solution based on your specific requirements. We'll then transfer our behavior-based tools and methodologies to you, so you can continue using them to improve performance long after our engagement is completed.