Gulf Safety Culture Survey Reporting Tool
User Guide

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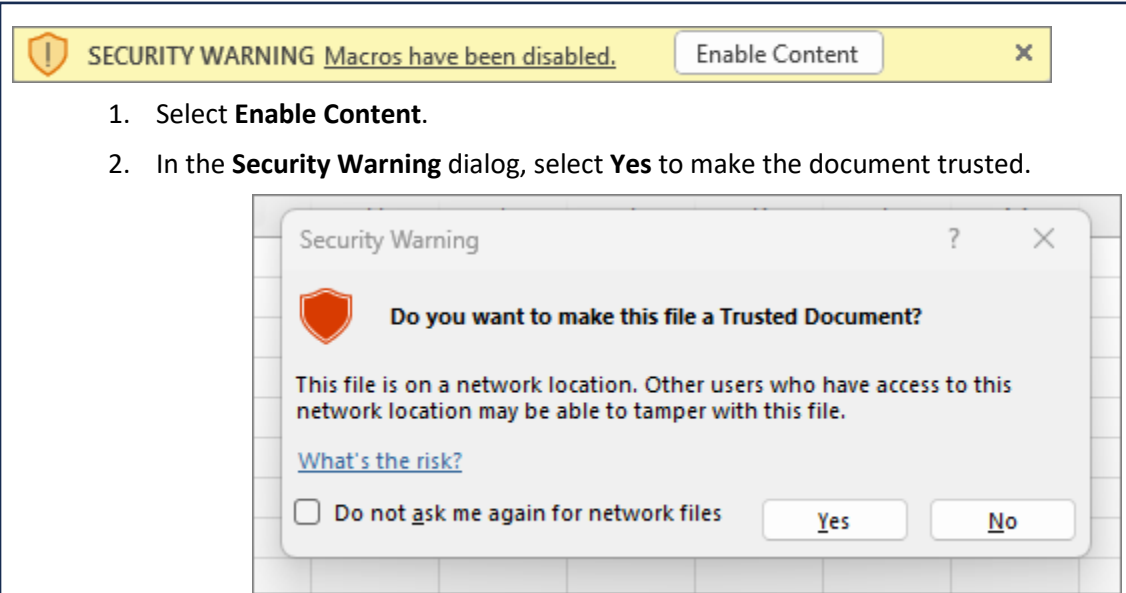
Safety Reporting Tool - Background

The Gulf Safety Culture Survey Reporting Tool is an excel file that allows you to easily examine the results from two of the measures of the SAFE-TOP survey (i.e., the Safety Emphasis measure, Safety Awareness measure). It is designed to enable senior leaders, managers, and team leaders to review the results and determine if any future actions might be needed to enhance safety. It contains dummy data designed to show how the summary and formatting work within the file. Average ratings are entered into the data tabs at the end of the file (replacing the dummy data) which then autocompletes the summary tabs for the two safety measures based on the unit of analysis (e.g., crew, facility).

The process for utilizing the excel spreadsheet:

1. **Administer the survey** (see Gulf Safety Culture Measures User Guide). Two of the survey measures can be summarized in this reporting tool – the Safety Emphasis measure and the Safety Awareness measure
2. **Calculate the average results** using any analysis software
3. **Familiarize yourself** with the contents of this spreadsheet and the tabs
4. Enter the average results of each item in the two measures in the appropriate cells in the **data tabs at the end of the file** (see the Adding New Data (Replacing Dummy Data) section); scan the tabs to ensure they look correct and fix any issues
5. **Review the results** to determine whether any actions are necessary to enhance safety - determine who to share the tool with and what to do to minimize any issues at the senior leader, facility, function, or team level (see the Getting Started in Reviewing Survey results section below)

Security Settings - Enable Macros

To enable the data to autocomplete the summary tabs requires macros. If you see a security warning when you open the spreadsheet or click on one of the buttons, you can choose to make it a trusted document and enable macros. Look for this yellow warning at the top of the spreadsheet:

1. Select **Enable Content**.
2. In the **Security Warning** dialog, select **Yes** to make the document trusted.

Macros are now enabled on this document.

Updating Excel Trust Settings

If you do not see a security warning but the buttons do not work within the spreadsheet, you may need to update your trust settings. Follow these steps to allow you to choose to enable macros:

1. Open Excel.
2. Click on the Office Button or File at the top left.
3. Choose Options.
4. Select the Trust Center in the left column.
5. Click on the Trust Center Settings button.
6. Select Macro Settings in the left column.
7. In Macro Settings, make sure to select Disable all macros with notification (this will disable the macros running automatically, but notify you to authorize them).

Note that enabling macros does not reduce your security protection. It simply gives you the option of choosing whether to allow the macros in a spreadsheet to run or not.

Also, the summary tabs are protected to prevent inadvertently overwriting data. How to unprotect the sheets is explained below.

Tool Tabs and Content

This tool contains several tabs which describe how to use the tool, potential ways to discuss the results, and matrices that present the results based on the measure and a unit of analysis (e.g., Facility, Function).

- **Background -** Explains the surveys, how the results are presented and navigating the file how to filter the results

- **Getting Started –** Provides a recommended process for working through the results and potential actions to take based on your findings.

- **Theme Discussion Questions and Scenarios -** Questions and scenarios for working with specific units on a given theme (see the Gulf Safety Emphasis Scenarios User Guide for additional information)

- **Safety Emphasis Measure Results Reports** - this data contains average responses for the 15 item Safety Emphasis Survey measure that are color coded based on the zones designated as either a target zone (green), a caution zone (yellow) or a concern zone (red). In addition, the 15 items can be viewed based on four themes. It is broken down by:

  - Overall – shows the results across the entire organization surveyed
  - Shift – Each shift for a given facility combined across work areas (e.g., all responses for Crew A for Facility B)
  - Crew – Each individual crew's (i.e., a shift within an area within a platform) data.
   - Maintenance, Instrumentation & Electrical (MI&E)

- Operations
- Construction
- Drilling & Completion
- Other
  - Employer—Overall results for [Company] based on whether respondents work for:
    - [Company] Employee
    - [Company on contract (Embedded Contractor)
    - Third Party (Contractor)
    - Other
  - Facility – Overall – each facility (e.g., Facility A, Facility B) with overall data combined across work areas and shifts
  - Function – Overall – each function (e.g., Construction, Operations) with overall data combined across work areas and shifts
  - Facility-Function – Each function for a given facility combined across work areas (e.g., all responses for Construction for Facility A)

- **Safety Awareness Measure Results Report** – This section summarizes the respondents' assessment of the percentage of people in their area who "know" about various hazards/risks (e.g., know the safety risks that could lead to a "disaster"). It reports average results for both General Safety Awareness and Fire Safety Awareness measures by [Company] Overall, Facility, Shift, and Crew.

- **Comments** – Write in comments from participants can be clustered by facility in response to questions about what the organization does well and what it could improve

- **Data tabs** – These tabs will be used to enter/paste the average ratings for each measure by a given breakout (e.g., Facility, Crew)

Adding New Data (Replacing the Dummy Data)

Below is the process for replacing the dummy data in the data tabs with the results of your survey.

1. **Open the data tab** (gray tabs at back of workbook) that corresponds to the data you want to enter for a specific survey section (e.g., Safety Emphasis). You can rename a tab and the header for Column A if you are reporting for a different item (e.g., shift, crew)

2. **Enter/paste your data** into the data tab.

3. **Sort the data** in the order that you want it to appear on the reporting page. You can use the arrows at the top of the column to sort into A-to-Z order.

4. **Go to the corresponding report tab** for that data. For example, if you have entered data on the "Employer Data" tab, then navigate to the "Safety Emphasis Rpt – Employer" tab.

5. **Click the Refresh Data button** to populate the report with your new data. You may see a message saying that there's already data in the report and asking if you want to replace it. If you see this message, click Yes.

6. The data should appear on the report with the red/yellow/green coding in place. You may need to **adjust the formatting for column widths and number formats**. If you do wish to make changes to the formatting, you will need to click on "Review" from the Excel menu and choose "Unprotect Sheet."

7. **Sorting the order of the columns**:

   - If you started with a blank data tab and have refreshed all new data into the report, the order of the columns should match the order on the data tab.

   - If you add additional rows to existing data on the data tab you may need to resort the order of the columns on the report page. To do this:

     a) Click on the arrow in the gray box that allows you to choose which columns to include

     b) Scroll down the list and be sure all of the choices are selected except (blank).

     c) To put the columns in alphabetical order, click on Sort A to Z.
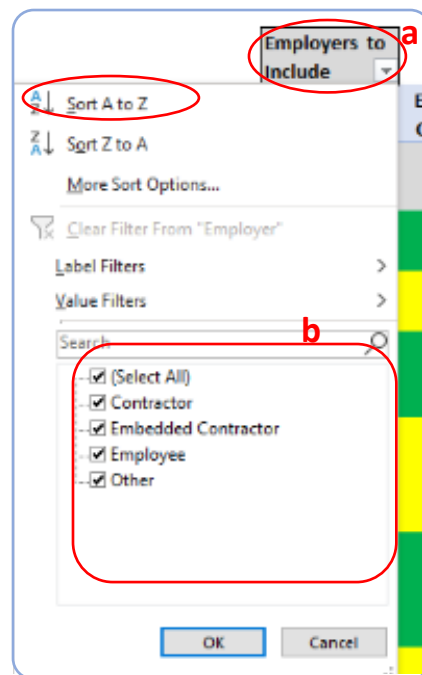
   - If you want to sort the columns into a different order, you can drag the columns to where you want them to be. To do this:

     a) Click on "Review" from the Excel menu and choose "Unprotect Sheet."

     b) Highlight the column you want to move. Do this by hovering your mouse near the heading for that column at the top edge of the cell until a small black down arrow appears and then click. A green rectangle should appear around the column of data. You can also just manually select the cells but be sure to select all of the cells that contain data within that column. **Do not select the entire column in the spreadsheet.**

c) Now hover your mouse over the green rectangle until your cursor turns into a four-pointed arrow. Then click and drag the column to the location you want it in the report.

8. **Once the formatting and sorting changes are complete** you can click on "Review" and "Protect Sheet," or you can just hit Refresh Data again to re-protect the sheet. Your sorting and formatting changes should be preserved.

Getting Started in Reviewing Survey Results

I. Overall Review of the Zones (for Leadership)

Below is a chart with the red, yellow green zones for each item as identified by a group of subject matter experts (SMEs). Review the ranges provided and determine:

- **Do you agree with the red, yellow, green zones that the SMEs proposed for each question, or would you assign them differently?**

- **What would you consider to be the ideal "target" score(s) for each question for your organization?**

NOTE: The zones were established based on subject matter expert input, but your organization might desire a slightly different safety culture emphasis.

Green = Target zone (where you would want the facility to be)
Yellow = Caution zone (not a major concern, but worth keeping an eye on)
Red = Concern zone (should be examined/addressed)

If you decide to modify the Red/Yellow/Green ranges, please note that will not change the color coding of these results within the spreadsheet.

Overall Zones

		0	1	2	3	4	5	6	7	8	9	10	
a)	Determining who made a mistake	0	1	2	3	4	5	6	7	8	9	10	Determining how to avoid future mistakes
b)	Completing today's work tasks	0	1	2	3	4	5	6	7	8	9	10	Trying to continuously improve
c)	Focusing on the errors of individuals	0	1	2	3	4	5	6	7	8	9	10	Focusing on problems caused by systems, policies, and practices
d)	Applying the same degree of inspection to everything	0	1	2	3	4	5	6	7	8	9	10	Applying different degrees of inspection based on risk
e)	Following procedures as written without exception	0	1	2	3	4	5	6	7	8	9	10	Recommending procedural adjustments to address unique situations
f)	Only respecting input from people in authority	0	1	2	3	4	5	6	7	8	9	10	Respecting input from anyone involved in the work
g)	Responding quickly to problems	0	1	2	3	4	5	6	7	8	9	10	Anticipating and preventing problems
h)	Reporting your own injuries	0	1	2	3	4	5	6	7	8	9	10	Working through your injuries
i)	Ensuring everyone is comfortable using stop work authority	0	1	2	3	4	5	6	7	8	9	10	Using stop work authority only when it is absolutely necessary
j)	Ensuring production remains on budget and on time	0	1	2	3	4	5	6	7	8	9	10	Ensuring work is done safely
k)	Communicating widely and openly	0	1	2	3	4	5	6	7	8	9	10	Communicating to those who need to know
l)	"Checking the box" on safety	0	1	2	3	4	5	6	7	8	9	10	Going above and beyond to ensure safety
m)	Asking questions if you are unsure	0	1	2	3	4	5	6	7	8	9	10	Figuring it out on your own
n)	Speaking up if you have a concern	0	1	2	3	4	5	6	7	8	9	10	Keeping quiet and letting things work themselves out
o)	Working quickly to keep up with the schedule	0	1	2	3	4	5	6	7	8	9	10	Taking the time to complete the tasks perfectly

II.   Overall Review for a Unit Across All Items (for Leadership)

For each facility or shift…how would you interpret this unit's *profile* of responses across the items? Do any patterns emerge?

Emphasis/Themes	Items
Theme 1 – Anticipate, prevent, understand, improve Emphasis on anticipating, preventing, understanding, and improving (vs. emphasis on fixing mistakes/errors and determining who is responsible) **Discussion questions for leadership**: • What are we doing that emphasizes anticipating potential problems, thinking systemically, and making improvements? • What might we do differently?	**A, B, C, G**
Theme 2 – Adjust appropriately Emphasis on adjusting to fit needs (vs. emphasis on consistency) **Discussion questions for leadership**: • What are we doing that encourages people to request adjustments when needed (e.g., recommending procedural adjustments, different degrees of inspection based on risk)? • How can we do that in a way that doesn't undermine the need for consistency?	**D, E**
Theme 3 – Promote psychological safety Emphasis on psychological safety, openness, and empowerment (vs. emphasis on control) **Discussion questions for leadership:** • What are we doing that makes it easier for people to speak up, ask questions, report injuries, and feel empowered to use stop work authority? • What might interfere with people feeling "psychologically safe" enough to do these things?	**F, H, I, K, M, N**
Theme 4 – Prioritize safety Emphasis on safety (vs emphasis on speed or production) **Discussion questions for leadership:** • What are we doing that emphasizes safety as the top priority? • How do we balance the need for speed and production with the critical need for safety?	**J, L, O**

III.   Item by Item Review for a Unit

- How do you **interpret** this unit's results on this question? What does their score on this question mean?

- What are **we doing currently** that might influence someone's response to this question?

- What **could we do** to change their perceptions on this question or to reinforce a healthy perspective?

- **Where might be the appropriate action point**? Should this be addressed at the organization, facility, unit, area, leadership, team, or individual level? Should actions be taken at multiple levels and cascade down?

Potential Actions

Below is a list of potential actions to address areas of concern. Actions can be taken at multiple levels (e.g., at the corporate/organization level if the issue is systemic, at the individual level if a team leader is not communicating and reinforcing appropriate safety measures).

- Safety awareness training at the appropriate level
- Additional safety communications
- Discussions at the facility level, area, or team level depending on whether that's appropriate. You can use the Discussion Questions and Scenarios to facilitate these conversations.
- Performance management changes – to the overall PM system, the reviews at a specific level, or the consequences of a review for an individual
- Coaching to reinforce safety awareness at the appropriate level
- Review of processes/procedures for modifications to minimize an issue
- Impact of human factors on potential issues and ways to minimize that impact
- Competency issues – knowledge, skill, capability, and acceptance of personal responsibility
- Impact of "will" – capability exists but is not followed and outcomes
- Hiring policies and requirements
- Investigation review processes and outcomes

Consider how our communications, policies, training, supervisor skills, consequences of actions, staffing, reporting, and rules/procedures influence what people think about our safety culture.

In addition, consider using the Gulf Safety Emphasis Scenarios User Guide or the Gulf Safety Culture Tips for Safety Emphasis Themes to discuss and determine appropriate actions to enhance safety.