



# CAMPBELL INSTITUTE™

## Defining Off-the-Job EHS excellence

A report from the Campbell Institute  
Research & Knowledge Sub-Committee

## About the **Campbell Institute**

The Campbell Institute (Institute) is the environmental, health, and safety (EHS) Center of Excellence at the National Safety Council. Built on the belief that EHS is at the core of business vitality and intrinsic to operational excellence and financial performance, the Institute helps organizations of all sizes and sectors achieve and sustain excellence.

A shared space for organizations to reach across industries to form deep, collaborative bonds, engage in open discussion on best practices as well as vexing concerns, and connect to thought leaders in many industry sectors – the Institute is the only place of its kind, anywhere in the world. Its true power lies in the sharing of proven knowledge, actionable solutions and lessons learned from leading-edge organizations around the globe.

The Institute not only provides a platform for the creation of EHS resources, but seeks to put this critical, timely information in the hands of those who need it most. That is why each member of the Institute is *Individually Strong*, but, joined together, *Collectively Stronger*. Through partnership, events, research and knowledge, the Institute is a driving force in EHS and thought leadership.

**[thecampbellinstitute.org](http://thecampbellinstitute.org)**

## About the **Campbell Award**

Established in 2004 and supported by a network of 22 Global Partners across five continents, the international Robert W. Campbell Award recognizes organizations that achieve excellence through the integration of EHS management in business operations. The award is named after the first President of the National Safety Council, a noted safety pioneer who believed that the success of the safety movement would depend on educating engineers, top executives and the general public on the business benefits of EHS.

To uphold his legacy, the Award honors measureable excellence in the triple bottom line of people, planet, and profit. Utilizing a rigorous, evidence-based review process, the Campbell Award identifies and shares critical knowledge that enables current and future business leaders to enhance and sustain organizational vitality by embracing the intrinsic value of EHS. The Award showcases successful business models from organizations that uphold EHS as a key business value, and excel in both EHS and business performance.

**[campbellaward.org](http://campbellaward.org)**

ROBERT W. ———  
**CAMPBELL**  
—————  
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## About **Research & Knowledge** at the Campbell Institute

Research is at the core of the Institute. Influenced by the diverse experiences of Institute participants, the Institute identifies critical EHS topics – those that are the most challenging and relevant to the EHS community at large – and actively carries out new and continuing programs to share what works in EHS and business excellence and solve what doesn't. By exploring the proven approaches and practical methods of world class organizations – and investigating those issues that hinder even our most-experienced participants – the Institute seeks to improve the safety of employees, the health of communities, and the vitality of the environment.

Undertaken in collaboration with insightful, qualified experts at the National Safety Council (NSC) and other experienced thought leaders, research at the Institute is managed by the Research and Knowledge Subcommittee. This research takes many forms – from definitive literature reviews to succinct white papers on key issues to peer-reviewed articles and original investigative work on emerging topics. Yet no matter its shape and size, Institute research stems from a common approach, is anchored by rigorous, thoughtful analysis, and is designed to be anything but another book on the shelf.

Put simply, what you hold in your hands represents hundreds of years of collective EHS knowledge and experience from the best of the best. We are excited to share it with you.

*“In my specific industry, I understand the strategies for success and have the opportunity to learn more from my colleagues and peers. It is with the Institute that I can branch out and discover new ideas and research from other industries, leading to stronger practices for my own organization.”*

**ELLEN QUINN**

VICE PRESIDENT OF EH&S,  
UTC CLIMATE, CONTROLS & SECURITY  
CHAIR, CAMPBELL INSTITUTE  
RESEARCH & KNOWLEDGE SUB-COMMITTEE

## About the **National Safety Council**

Founded in 1913 and chartered by Congress, The National Safety Council (NSC) is a nonprofit organization whose mission is to save lives by preventing injuries and deaths at work, in homes and communities and on the road through leadership, research, education and advocacy. NSC advances this mission by partnering with businesses, government agencies, elected officials and the public to make an impact where the most preventable injuries and deaths occur, in areas such as distracted driving, teen driving, and workplace safety and beyond the workplace, particularly in and near our homes.

[nsc.org](http://nsc.org)

## Abstract

Off-the-job environmental, health and safety (OTJ EHS) generally refers to the conditions and practices that occur outside of the workplace and impact the health, safety and well-being of employees as well as their family members, communities, and the environment. The Campbell Institute (Institute), the environmental, health and safety (EHS) center of excellence at the National Safety Council (NSC), conducted a survey to better understand off-the-job (OTJ) EHS strategies and policies of leading organizations. This information was collected and analyzed with the intent to address the growing interest among organizations to identify and implement evidence-based EHS practices and programs that reduce injuries, save lives, and improve the environment. The 10 Campbell Founders that responded to the survey indicated that OTJ EHS policies and programs were a priority to their organization. Additionally, while viewed by most organizations as an important issue, when compared to other aspects of EHS, OTJ EHS tends to involve a less formalized management system approach. Evidence suggests that successful implementation of OTJ EHS initiatives occurs even in the absence of formal policies concerning the issue. Although only 40% of the surveyed companies reported having written OTJ EHS policies, most of those who did said that the policies had a positive impact on the safety of employees and their family members, and findings indicate that most organizations have experienced an increasing level of employee engagement in OTJ EHS. Future directions for OTJ EHS initiatives are discussed, including greater formalization of OTJ EHS efforts, engagement of employee and community stakeholders, and more accurate and rigorous collection of OTJ EHS data.

## Background and Definition of “Off-the-Job” EHS

On-the-job activities and impacts are the primary focus of EHS professionals across industry sectors, and have remained so for many years. Even with the many advances seen in on-the-job EHS over the past hundred years, this focus has persisted with good reason. According to the NSC, the total cost of workplace injuries is nearly \$180 billion per year. Despite decreasing fatality, injury and incident rates, a worker in the United States still has to produce \$1,300 worth of goods or services just to offset the cost of work injuries.

Yet the number of worker deaths and injuries that occur outside the workplace far outnumber those occurring on the clock. Although the statistics associated with workplace injuries are staggering, they pale in comparison to the number of injuries employees sustain off duty. Nine out of 10 worker deaths and about 70% of worker injuries occurs off-the-job. Almost 14 times the number of deaths occurs off than on-the-job, while two times as many medically-consulted injuries occurs off-the-job. Production time lost due to off-the-job injuries amounts to an estimated total of 240,000,000 days per year, compared to only a quarter of that number accrued by workers’ on-the-job injuries.\*

As used in this study, the term “off-the-job environmental, health, and safety” (OTJ EHS) is defined broadly to refer to the conditions and practices that occur outside of the workplace and impact the health, safety, and well-being of employees as well as their family members, the communities, and environment in which they live. This includes everything from motor vehicle crashes and falls to exercise programs and disease prevention, as well as energy conservation and environmental footprint reduction efforts.

\* *Injury Facts*® 2010 Edition

While highly mature and complex on-the-job EHS management systems have become more commonplace, similar approaches to OTJ EHS are less usual, and although EHS training equips employees with the skills to recognize hazards and prevent injuries in the workplace, the question remains as to whether workers apply that training to similar or relevant off-the-job situations. In order to increase on-the-job productivity and lower costs associated with lost time, organizations that truly lead with EHS are now incorporating more sophisticated off-the-job policies and practices.

## Research Method

To better understand the OTJ EHS strategies, initiatives, and policies currently employed by leading organizations, the Institute surveyed 14 of its Founders, including previous Campbell Award winners and members of the NSC World Class Team – a Team of diverse organizations that work with the NSC, and the Institute, to define EHS excellence. Collectively, these organizations largely perform within the top quartile of their industry sector. In general, Institute Founders display mature, resilient, and rigorous EHS management systems grounded in continuous improvement and strongly tied to the operational success of their organizations. This group is viewed by the Institute as a bellwether of EHS and business excellence.

The survey questions were developed by the Research & Safety Management Solutions team at the NSC in partnership with the Institute. Respondents were asked to answer a series of either “Yes/No,” multiple choice, and free response questions related to OTJ EHS. Although the survey was anonymous, respondents were given the option to submit contact information in order to share their company’s experiences regarding OTJ EHS in future research studies. The survey was administered online in July 2012 and 10 responses were received from the originally polled companies.

This white paper reports on the most prevalent trends that emerged from both the quantitative and qualitative data gathered from the 10 participating organizations. Due to the small sample size, generalizing the survey findings to all companies offering OTJ EHS programs may be difficult, yet the research offers an intriguing look at possible trends and approaches amongst top EHS and business performers.

## Survey Participants

The following key points describe the composition of the individuals and organizations who responded to the survey:

- ▶ The majority (n=6) of the survey respondents were EHS professionals; half of the respondents were Executive Management (Vice President or higher) whereas the other half were middle management (e.g., Director, Department Lead).
- ▶ Most described their organizations’ economic sector as Manufacturing, including petroleum production, with one respondent from the Transportation and Warehousing sector and another from “Other services (except Public Administration).”
- ▶ Organizations ranged from 500 to 200,000 employees and the respondents were both U.S. and internationally-based.





## Results

The results of the survey are presented below and arranged by the OTJ EHS topic area. Analyses and interpretation of the results are also provided as appropriate.

### Organizations with Written OTJ EHS Policies

The foundation of many EHS management systems includes a written EHS policy that is adopted by management and communicated broadly. However, some organizations also choose to adopt specific policies around EHS topic areas. Four out of the 10 respondents reported having a written OTJ EHS policy. Of these four, one company introduced their policy in 1987, with the most recent revision to the policy in 2011. Another company introduced their policy in 1996, with their most recent revision in 2008. Whereas the majority of respondents did not have an official written OTJ EHS policy in place, those who had one, incorporated OTJ EHS programs over a decade ago. According to recent revisions, OTJ EHS has remained relevant for these organizations.

### OTJ EHS Policy Impact

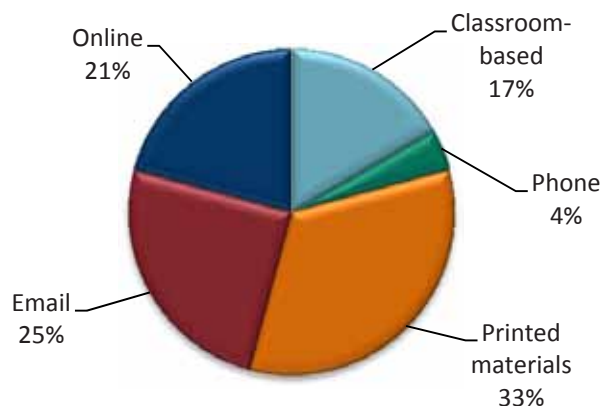
One major goal of formal OTJ EHS policies is to decrease the number of employee injuries outside the workplace, thereby lessening the amount of production time lost. Hence, the impact of OTJ EHS policies on injuries experienced by employees and their families off the job was a central issue investigated through the research.

- ▶ Two out of four respondents with OTJ EHS policies reported that employee off-the-job injuries had decreased since the adoption of their organizations' OTJ EHS policies.
- ▶ Although motor vehicle injuries is the second leading cause of fatalities and third leading cause of injuries off-the-job, one respondent out of 10 reported that off-the-job motor-vehicle crashes had decreased, while another reported the amount of off-the-job accidents stayed the same.
- ▶ Also, two respondents reported that injuries to employees' family members decreased.

In general, OTJ EHS policies were found to have had a positive impact on off-the-job employee injuries and motor-vehicle crashes. As an added benefit, OTJ EHS policies also had a positive relationship with the decline of injuries among employees' families.

### OTJ EHS Training

OTJ training and education is provided by the 10 companies who responded to the survey. The research found that companies utilized a variety of methods in order to deliver OTJ EHS education and training materials to employees. The most frequently chosen method was printed materials, followed closely by email and online materials.

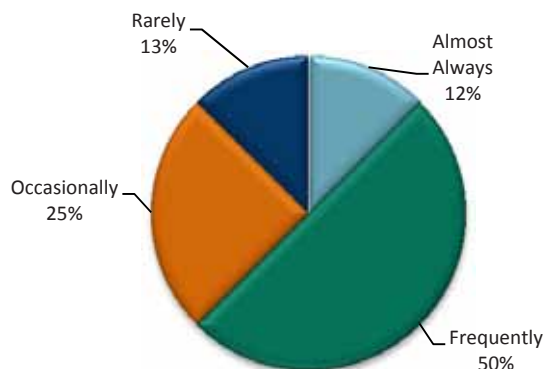


### Leadership Involvement with OTJ EHS

As with any EHS policy or program, the success of implementing specific OTJ initiatives throughout an organization significantly depends on management's involvement with and attention to the promotion of the issue.

- ▶ Although the companies with written OTJ EHS policies reported their Safety Department staff typically takes the lead on OTJ EHS policy issues, survey results indicated that across all companies (both with and without formal policies) management often communicate with employees about OTJ EHS issues, even if they did not typically set formal off-the-job performance goals.
- ▶ Furthermore, as depicted in the chart below, 50% of total respondents reported frequently discussing OTJ EHS issues as part of the agenda at management meetings, while an additional 12% almost always discussed OTJ EHS issues.

These findings indicate that for the majority of total respondents, OTJ EHS was an important issue for management, but not one that has seen formal implementation and/or goal-setting.

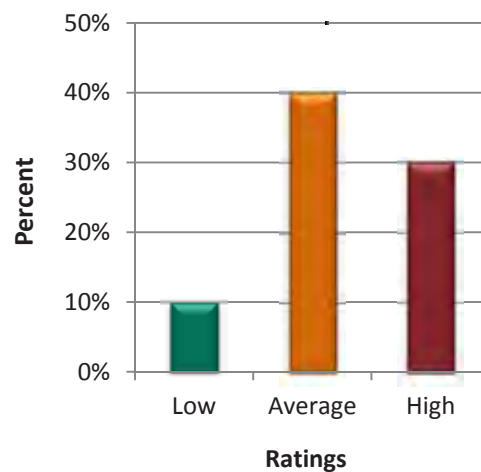


### Making OTJ EHS a Priority

Across all of the respondents, the issue of OTJ EHS itself was viewed as important across industries.

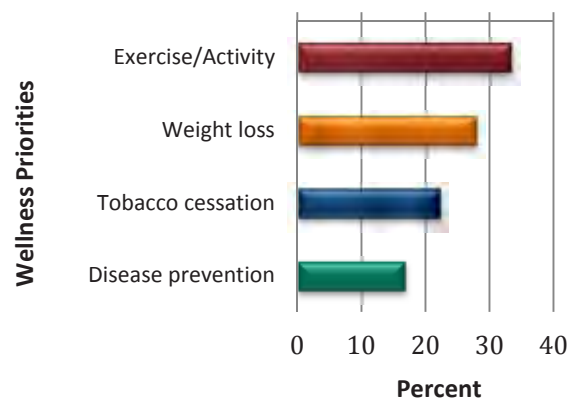
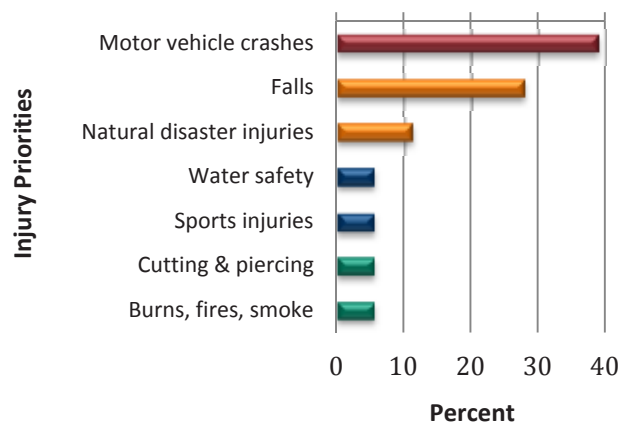
- ▶ Of eight respondents, half rated OTJ EHS as an average priority for their company for the next three to five years.
- ▶ OTJ EHS was a high priority for 37.5% and a low priority for one respondent.
- ▶ None of the respondents rated OTJ EHS as either a 'very high' or 'very low' priority.

Overall, the majority of the companies surveyed felt OTJ EHS was at least an average, if not higher, priority for their company in the near future.



### Top Priorities for OTJ EHS Promotion

According to the 2012 edition of Injury Facts, workers' off-the-job fatalities pertain to fatalities suffered by the employed population. The top two causes of worker off-the-job fatalities at the national level are poisoning and motor vehicle incidents. In comparison, motor vehicle incidents were of the utmost concern for survey respondents, while falls and injuries due to natural disasters were the next highly rated injury-related priorities for OTJ EHS promotion. In addition to exploring priorities regarding injuries, the survey also addressed priorities around health and wellness. The top rated wellness priorities for respondents were exercise/activity, followed closely by weight loss, tobacco cessation, and disease prevention, respectively.



### Nature of OTJ EHS Programs

Respondents were asked to what extent they agreed with various statements that described their companies' OTJ EHS programs and initiatives. Key findings of the survey included:

- ▶ Across companies:
  - OTJ EHS was included in safety programs
  - Employees were included in planning programs
  - OTJ EHS programs were often included in the Employee Assistance Program (EAP), and
  - Employee feedback was used to evaluate these programs.
- ▶ Employee participation in OTJ EHS programs was not mandatory for most companies.
- ▶ Only one company reported that their OTJ EHS initiative was designed in partnership with community stakeholders.
- ▶ Four out of seven respondents reported employee participation in OTJ EHS programs was increasing.

### Challenges with OTJ EHS and Family Injury Data Collection, Analysis, & Reporting

Respondents most often collected OTJ EHS information from their employees related to family member injuries, off-the-job safety incidents including near misses, and employee injuries off-the-job regardless of severity. As a result, the research indicates that not only are companies interested in the safety of their employees, but also the safety of their family members.

Companies reported multiple methods of OTJ EHS data collection, which included:

- ▶ Number of employees completing a health assessment
- ▶ The participation of families in their company's health and safety day and summer campaign
- ▶ A health risk assessment questionnaire
- ▶ Overall health insurance cost, and
- ▶ Days away due to injury.

Although respondents expressed an interest in collecting specific information on OTJ EHS, half of the respondents surveyed reported that they did not collect off-the-job injury information directly from their employees.



When asked what the biggest obstacles they were faced with regarding off-the-job and family injury data collection, analysis, and reporting, privacy issues were mentioned the most (three times), closely followed by not enough incident reports being filed (two times). Other challenges were the resources required to gather information and employees' full participation in completing health risk assessments.

## Implications & Further Discussion

The results of this survey offer valuable, if not exhaustive, information on how companies that have excelled in EHS and business performance approach the EHS of their employees and employees' families away from the workplace. There is little doubt that OTJ EHS has been recognized as an important element of EHS from both the financial and ethical perspectives.

It is clear that the companies included in the survey use a less formalized approach to managing OTJ EHS; more than half of them do not have written OTJ EHS policies. In contrast to traditional EHS practices, management does not necessarily set formal performance goals for OTJ EHS. Employees may choose to not participate in OTJ EHS programs, whereas their participation in workplace EHS activities is typically expected and required.

Nonetheless, the results reveal that a lack of formal policies and procedures does not prevent employers from trying to improve the safety and health of their workers through workplace-delivered initiatives. Two common practices that deserve particular attention are (1) the integration of OTJ EHS messages into existing workplace safety programs and (2) the offering of Employee Assistance Programs with a focus on promoting safety and health in the home and community.

It is also encouraging that the issue of OTJ EHS has high visibility and attention among executive-level managers and leaders, who show their commitment by frequently communicating with employees on OTJ EHS topics and including employee perspective in the design and evaluation of OTJ EHS programs. Some even go as far as taking OTJ EHS into consideration when making business location or relocation decisions.

Many survey respondents, however, acknowledge that OTJ EHS is not the highest of priority for their companies, which suggests that the issue may be perceived as one of secondary importance compared, for example, to the companies' operational readiness, sustainability, and/or more traditional, workplace EHS-related matters. This finding may be a reflection of the need to further inform employers about the impact of off-the-job injuries on employee health, productivity, absenteeism, increased health care utilization, and other associated costs, as well as the benefits of OTJ EHS in terms of public perception, community engagement, and building of competitive advantage within their industries. Furthermore, employers may require education regarding how on-the-job EHS culture can be strengthened by helping employees adapt to and practice safe behaviors beyond the fence line.

In the most recent study investigating the relationship between organizational size and allocation of resources to OTJ EHS initiatives, a 2003 study of 1,300 NSC member organizations found that company size was associated with the extent to which OTJ EHS programs were offered to employees. Specifically, the percentage of companies offering OTJ EHS programs increased from 17% among small employers (1-99 employees), to 33% among medium employers (100-499 employees), to 50% among large employers (500+ employees). In the current survey, company size did not have an effect on the OTJ EHS practices and priorities of survey participants. However, this finding may be explained by the fact that large-size employers were overrepresented in the survey sample.

This survey's results indicate that, by and large, OTJ EHS policies and programs have had a positive impact on the safety of employees and their families. Promoting safe behavior off-the-job appears to be particularly important for reducing motor-vehicle crashes. It is not surprising that motor-vehicle safety was rated as the top off-the-job safety priority among the surveyed companies. Companies in the United States spend millions of dollars every year to improve the safety of employee drivers knowing full well that their investments eventually pay off through reduced crashes and increased cost savings due to avoidance of unnecessary medical expenses, raises in insurance premiums, property damage, workers' compensation claims, hiring and training of replacement workers, and other direct and indirect factors.

The companies surveyed also indicated that exercise/activity was the most important component to emphasize in the promotion of employees' wellness off-the-job. Similar to companies' focus on motor-vehicle safety, exercise also has strong links to benefits in the workplace, such as improving worker productivity, decreasing sickness and thus the cost associated with lost time, and increasing job satisfaction. Taking these benefits into consideration, some companies have made efforts such as offering gym memberships at discounted rates for employees or developing fitness programs made available to employees on-site. Overall, a strong business case can be made for implementing safety initiatives aimed at off-duty driving behavior and health initiatives aimed at exercise as they directly relate to the employee's ability to remain injury-free and productive.

Survey findings about policy effectiveness should be interpreted with a certain degree of caution because the information gathered in the survey does not provide enough detail to establish what methods the companies surveyed use to collect and analyze their data. There was also no information collected regarding the effectiveness of specific interventions implemented to improve OTJ EHS.

## Future Directions

Organizations have devoted considerable effort to positively impacting employee productivity. The integration of EHS into all aspects of business operations is an enormous opportunity to have the safest and most productive workforce possible. Therefore, it should not be surprising that EHS leaders today view motor-vehicle safety, the promotion of exercise, fall prevention, and the protection of communities and environments as worthy of inclusion in their efforts alongside more traditional workplace-based EHS activities.

In fact, there are several areas where these issues go hand in hand and the NSC has had an ongoing effort in exploring these practical areas through empirical research. For instance, a 2008 NSC study showed that Tai Chi, a traditional form of Chinese martial arts, offers benefits in terms of both safety (by preventing slips, trips, and falls through increased sense of balance and muscle strength) and health (by increasing overall physical fitness). Physical exercise has been shown to be an effective countermeasure against fatigue and, thus, crashes among commercial truck drivers.

Thus, OTJ EHS stands at the intersection of workplace safety, environmental protection, employee health and wellness, and business management - evolving fields where innovation occurs at a rate faster than ever. While OTJ EHS is seen as important to many, opportunities abound for greater formalization of OTJ EHS efforts, engagement of employee and community stakeholders, and more accurate and rigorous collection of OTJ EHS data. Even something as simple as the creation of an official OTJ EHS policy would appear to be an effective step that many organizations can take to begin the journey toward more robust and impactful off-the-job efforts.

Despite the challenges that may lie ahead for organizations in the implementation of more holistic OTJ EHS systems, this survey has demonstrated that success is possible where the same, familiar principles of leadership, effective communication, active employee engagement, integrated programming, and continuous improvement are applied to create a whole that is greater than the sum of its parts. The Institute looks forward to undertaking continued research on the issue of OTJ EHS and building upon existing work of the NSC in regards to OTJ EHS. This could include a more detailed exploration of leading organizations' OTJ EHS practices, by possibly contacting the four Campbell Award winning companies that with written OTJ EHS policies, determining their best practices, and conducting a comparative analysis between them and other companies without formal policies in order to advance the research on OTJ EHS. Ultimately, this could result in the development of a more prescriptive approach to OTJ EHS informed by these findings.

## A Proposed Model of OTJ EHS Excellence

Based on the findings of the survey, the Institute has proposed the following model of OTJ EHS Excellence, which begins with engagement leaders and employees and reaches its fullest potential with engagement of community stakeholders. This model is preliminary and provisional, but may serve as a thesis against which further OTJ EHS research can be conducted in the future.



We welcome your feedback, thoughts, and suggestions on OTJ EHS research at the Institute. Please contact us at **[campbellinstitute@nsc.org](mailto:campbellinstitute@nsc.org)** or visit us on the web at **[thecampbellinstitute.org](http://thecampbellinstitute.org)** to learn more and discuss these findings with your peers!

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