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Case Summaries for Teaching

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Amazonia Delivery Services

Robert Hickey

Queen's University

This case is a fictional account of a Vancouver-based Amazonia Delivery Services (ADS), which provides delivery for the online retailer, Amazon. It wishes to expand to four key markets – Calgary, Toronto, Montreal and Halifax.

The case describes operational issues facing ADS as it tries to expand including various Health and Safety concerns. Three technology options for growth are presented in the case including a large volume sorter and a micro sorter. Students are asked to assess these options and to outline a strategy plan to manage the change process.

Keywords: Human Resource management, occupational, health and safety, change management, labour relations, strategic management, organizational structure

San Jose Mining Company

**Kent Keeler; William Crothers; Deborah McPhee
Brock University**

Case Summary

This case is based on a mining accident in 2010 at the San Jose Mine, a medium sized copper mine in Chile. At the time of the accident, the mine was marginally profitable, and had only recently reopened to take advantage of rising mineral prices. Furthermore, not all the safety recommendations had been completed at the time of the opening. Similar to other such small and medium sized copper mines in the region, the health and safety program at San Jose was spotty.

A rock burst left 33 miners trapped about 600 metres below the surface. Management response is the problem for this case. Management is concerned not only by the scrutiny of government authorities, but by members of the international community as well. However, an extensive mine rescue would threaten the financial solvency of the mine.

Keywords: occupational health and safety; mining; strategic management; business ethics; corporate social responsibility

SNC-Lavalin T & D: A Model in SHE Management

Anis Hague and Palash Bagchi
University of Calgary

Case Summary

This case is a detailed account of the award winning safety, health, and environment (SHE) program at the Transmission and Distribution (T & D) division of the Montreal based SNC-Lavalin. Detailed reports are found on the following: major hazards and control; safety management and leadership; and, risk management and human resource development.

The scope of this case is to understand SNC-Lavalin T&D's SHE management practices, and how these have enhanced:

- A reduction in lost time accidents
- An improvement in labour management relations
- Product quality and production efficiency
- Profitability

Keywords: SHE management; business strategy; labour relations; human resource management; electric transmission; engineering; safety leadership; best practices

Code Red: Health and Safety at GH2

Robert Hickey
Queen's University

Case Summary

This case is a fictional account of the state of occupational health and safety management at the Golden Horseshoe General Hospital (GH²). In short; this hospital has an injury rate that is 50 per cent higher than the industry average.

Data and analyses include the following: accident rates; direct and indirect costs of workplace accidents; New Experimental Experience Rating (NEER); disability management, and leadership.

Students can act as consultants to the Board of Directors and make recommendations, along with costs, to ensure the following:

- The hospital has an effective process to address and correct unsafe conditions;
- Employees are trained about their responsibilities and are empowered to report unsafe conditions;
- Investigations of accidents and near misses involve the union, determine root causes, and take action to correct the root cause;
- A health and safety system audit is completed at least annually; and,
- Occupational health and safety goals focus on making improvements to the safety system and promote a safety culture (not just reduce costs).

Keywords: human resource management; health care; direct costs; indirect costs; safety culture; leadership; legal compliance

Recovering from SARS: Worker Health and Pandemic Planning

Robert Hickey
Queen's University

Case Summary

This very popular case begins with a report on the extent of the SARS viral pandemic of 2003 that resulted in the deaths of 44 people in Ontario. Nearly half were health care workers.

The case then gives an account of the SARS experience at the fictional Ontario hospital GH², and its limited current preparedness. Interviews with senior management and staff also suggest human resource management issues that need to be addressed. As part of the solution to these problems, references are made to the British Columbia experience, and to the health and safety recommendations of the Campbell Commission Report.

Keywords: occupational health and safety; human resource management; change management; biological agent; health care; hospitals; pandemic planning; labour relations

Putting Out Fires: Northern Lights Energy

Robert Hickey
Queen's University

Case Summary

This case is a fictional account of the managerial problems at the petrochemical refinery of Northern Lights Energy. The company has an increasingly poor health and safety record that correlates positively with the use of contract workers.

The contract workers have been hired to cut costs and are almost equal in number to the unionized employees. There has been increasing friction between these two groups. For the unionized employees, the contract workers are a threat to job security, and are not well trained in safety. There have been instances of employee sabotage, and an explosion on the site blamed on the union.

Keywords: occupational health and safety; human resource management; labour relations; strategic management; contract workers; petrochemical industry

The Long Haul: Sustaining Growth and Safety at Traxall

Robert Hickey
Queen's University

Case Summary

Traxall Trucking Services has added to its operations in petrochemical hauling with the recent acquisitions of Hammel Hauling and Sarnia Chemical Haulage. These acquisitions have achieved the first goal of the growth strategy of achieving market share. However these newly acquired operations have not been effectively integrated into Traxall's existing structure of operations.

Outstanding issues in need of resolution include the following: union employee dissatisfaction over increasing use of independent operators; changes in calculating employee compensation; and, poor safety records with increasing workers' compensation costs.

The problem at hand is to identify the major employee relations and health and safety issues, and to develop a strategic human resource action plan that would make Traxall's growth strategy a success.

Keywords: health and safety; labour relations; trucking industry; strategic human resource management.

Caesar Foundries Industry

**Deborah Zinni
Brock University**

Case Summary

Fictional Caesar Foundries employs 200 people producing iron pipes and is located in an isolated small town in Northern Ontario. This case includes a detailed account of the foundry production processes, and interviews with management and production staff. The plant has some serious occupational health and safety issues that include evidence of workplace violence. There are other human resource management concerns.

One production worker who had been involved in a fight was soon after fatally injured. This has brought problems to a head. At the end of the case students are presented with the following questions:

- What are the underlying problems at CFII?
- What could have been done to prevent the fatality
- Can they afford not to make changes? Why or why not?
- Is it reasonable to expect that a foundry will have more accidents and fatalities compared to any other industry? If so, what should be done about this?

Keywords: occupational health and safety; human resource management; workplace violence; foundry; fatality

China Lucky Star Mining Company

**Deborah Zinni
Brock University**

Case Summary

This fictional case deals with the impact of a new partnership on a small family owned nickel mine in Sudbury Ontario. Mac Mine was having financial difficulties when it accepted a buy in from the China Lucky Star Mining Company. Management and mine foremen for the new venture were from both companies.

The Chinese were relatively lax about health and safety standards, procedures, and training. In the first year of the partnership the number of serious accidents quadrupled. Furthermore there had been a serious underground accident with the possibility that the Ministry of Labour would shut down the mine for weeks. Given the need to address this deteriorating situation, the problem for students is to make recommendations to the Canadian CEO as to what should be done now, and in the future.

Keywords: occupational health and safety; mining; new ventures; strategic management; Ministry of Labour

Automotive Plastics Ltd.

David Carey, et al.
Queen's University

Case Summary

This fictional case deals with a small plastics manufacturer for the automotive industry. Detailed descriptions and data are presented on automotive plastics, the fit with the automotive industry, and the plant operations in Belleville Ontario. There are three outstanding issues that management needs to address as follows: maintaining quality production; health and safety; and, employee relations.

Keywords: occupational health and safety; human resource management; employee relations; strategic management; plastics; automotive parts industry

Cover-Shield Failure and Falling Incident at a Hydroelectric Generating Station

Marc Rosen
Ryerson University

Case Summary

Based on an actual situation, this case deals with a high risk incident at a power plant. A cover shield on a bay door weighing 5.5 pounds fell 70 feet and almost injured two workers. This was deemed a high risk incident, the area of the plant was immediately closed down, and a root cause investigation was undertaken.

It was determined that the root cause of the incident was poor “equipment design”. Contributing factors were poor maintenance and problems with the safety bar on the bay door.

Among other issues, this case underscores the critical importance of good engineering design for a safe work environment.

Keywords: engineering; product design; incident investigation; health and safety; electric power plant

Engineering Health and Safety Module and Case Studies

Marc Rosen
University of Ontario Institute of Technology

Case Summary

This material has been designed as a health and safety module primarily for engineering students. It begins with very good concise summaries of a variety of issues in health and safety management, the stakeholders concerned, types of hazards, and includes ethical dilemmas.

The material also includes a small case study dealing with an automobile engine plant, and poses a variety of questions for students dealing with three different scenarios.

Keywords: engineering; teaching module; health and safety; automotive parts plant; general management

Health and Safety in Mining: Inco (Levack) Ltd. (A)

Julie Barr
Laurentian University

Case Summary

This case first describes the operations nickel mining at the Levack Mine when it was in operation and owned by Inco. In 1987 it was considered one of the safest mines in the world, and was awarded the highest rating according to the “5 Point Safety System”. Nonetheless there was a fatality the same year that resulted in the deaths of four miners. Details are given of the fatality, and the health and safety experience at the mine. The problem posed is: how could these fatalities occur in what was considered such a safe mine?

Keywords: mining; occupational health and safety; human resource management; fatality; health and safety management system.

The National Rubber Company (A)

James Chisholm and Perry Banji
University of Toronto

Case Summary

National Rubber has over 700 employees in two Toronto locations that produce over 700 rubber products for the automotive industry. Currently only 80 of these products are profitable. The case provides begins with a discussion of a rubber industry as a whole, and the production processes at National Rubber. The newly hired CEO has some major issues to deal with that include the following:

- An antiquated management structure
- Outdated manufacturing technology
- A demoralized workforce
- A poor health and safety record
- Problems with product quality and timely delivery

Where does the new CEO begin to turn this company around?

Keywords: strategic management; human resource management; occupational health and safety; rubber; automotive parts

Noble Corporation: Project Windmill

Brooks Holtom
Georgetown University

Case Summary

This case deals with Noble's acquisition of Nedrill. The former is a leading US based shallow water petroleum driller, and is considering the international acquisition of the Dutch based deep water driller Nedrill. Corporate strategies and operations of both companies are presented.

Cultural, social, governance, valuation, and health and safety issues loom large as risks that could derail the deal. Can Noble's core competencies in operational excellence and SHE management be extended to such an acquisition?

Keywords: strategic management; acquisitions; SHE management; petroleum drilling; occupational health and safety

Storey Energy

**Michael Manjuris
Ryerson University**

Case Summary

Storey Energy is a pipeline firm with a division that sells pipes, and a service division that does pipeline installation and maintenance. Storey employs 17 people full time, and hires some 60 contract employees during the busy season. George Storey, the founder, is still the CEO and General Manager.

Mr. Storey has always valued his employees as his key resource, and has had a hands on approach to health and safety without a formal system being in place. A recent accident from a competing contractor has forced him to reassess this position. His chief engineer is promoting a system that has three components: showing in writing management commitment to safety; relating safety performance to a defined business need; and, auditing worker behaviour to measure safety improvement and define corrective action. The problem for this case is this the system he needs and can successfully implement?

Keywords : SHE management systems ; pipeline contracting ; occupational health and safety ; strategic management

Seven Oaks General Hospital Case Study

**Sue Bruning
University of Manitoba**

Case Summary

This case study summarizes the development of Seven Oaks General Hospital approaches to employee health and safety as well as workplace wellness. The history of the hospital and the Wellness Institute are provided. The focus of the case is on a middle manager's decision making role in deciding upon a strategy to integrate wellness initiatives with health and safety.

Keywords: health care; wellness; hospitals; occupational health and safety

Seven Oaks General Hospital

(Condensed Version)

Sue Bruning
University of Manitoba

Case Summary

This case study summarizes the development of Seven Oaks General Hospital approaches to employee health and safety as well as workplace wellness. The history of the hospital and the Wellness Institute are provided. The focus of the case is on a middle manager's decision making role in deciding upon a strategy to integrate wellness initiatives with health and safety.

Keywords: health care; wellness; hospitals; occupational health and safety

Dofasco Inc.

Karlene Harry, *et al.*
McMaster University

Case Summary

This case deals with a delivery truck worker who was reported as speeding and crossing activated railway crossings while delivering parts for the company. Such activity does pose a serious health and safety risk, and could endanger members of the community. From the worker`s perspective, this was done in order to help the company. The material being delivered was in urgent need by the maintenance staff. The issues in this case are who is at fault and what discipline might be appropriate.

Keywords: occupational health and safety; discipline; trucking; driving

Canadian Pacific Railway Company: Early and Safe Return to Work

A Case from a Best Practice Employer

Paul Leonard Gallina
Bishop's University

Case Summary

Using examples from the award winning program at Canadian Pacific Railway Company, this case introduces the process and best practices of occupational disability management. From an ethical, legal and cost perspective, returning the worker to early and safe work is essential to managing occupational health in the post-accident phase.

The case concludes with recommendations by a joint management-labour return to work committee. Readers are asked to assess a variety of managerial issues that arise from this account.

Keywords: disability management; occupational health and safety; early and safe return to work; labour relations; best practices; corporate social responsibility; duty to accommodate

Wellness Institute at Seven Oaks General Hospital

Sue Bruning and Carol Deckert

Case Summary

This case study summarizes the development of the Wellness Institute at the Seven Oaks General Hospital. Part of the Institute's mandate is to provide health and safety services to organizations outside the hospital. The history of the Wellness Institute is provided along with a summary of external outreach activities. The focus of the case is on the challenges on developing strong demand for the Institute's programs and services in the general community. Experiences from three clients are summarized to provide ideas for market development.

Keywords: wellness; occupational health and safety; services; marketing; outreach

General Motors: Achieving and Maintaining World-Class Leadership in Worker Health and Safety in the Automotive Industry

Marc Rosen
University of Ontario Institute of Technology

Case Summary

Based on actual archival data and interviews, this case documents the turnaround in occupational health and safety at GM's Oshawa Truck Plant. Given a relatively poor record in occupational health and safety, management developed a new leadership approach based on creating a safety culture. Key features of the new health and safety system are presented. Data on the improvements to world class levels of performance are also included. The case concludes with lessons learned.

Keywords: occupational health and safety; turnaround; safety culture; safety climate; leadership; automotive industry; SHE management systems

Development of an Enhanced Ceiling Fan: An Engineering Design Case Study Highlighting Health, Safety and the Environment

Marc Rosen
University of Ontario Institute of Technology

Case Summary

From an engineering design perspective, this case study describes the development of an enhanced ceiling fan, highlighting, where appropriate, health, safety, and environmental considerations. This case is designed to provide instructors with a teaching aid that illustrates a holistic approach to engineering design, and how SHE factors can be incorporated.

Keywords: engineering; design; SHE principles; ceiling fan

Keefe Restaurants Inc.

**Sean Tucker
University of Regina**

Case Summary

This fictional case deals with customer abuse at a location of Keefe Restaurants, a chain that employs about 20 workers in each restaurant. A survey of employers has indicated a high level of customer abuse. Readers are asked to respond to the following:

- **Is the customer-initiated workplace abuse and ethical issue?**
- **Propose specific measures to address the problem.**
- **Identify stakeholder interests that may be affected.**
- **Describe how conflicts among various stakeholders can be minimized.**

Keywords: occupational health and safety; restaurants; workplace violence; customer abuse

Tosi Industries

Sean Tucker
University of Regina

Case Summary

Fictional Tosi Industries employs 700 people, and manufactures solar panels. It functions as a lean manufacturing operation, and provides employee bonuses based on exceeding production and profit targets. It has just been announced that Tosi is about to receive a coveted industry safety award just as the company has experienced three serious incidents. Dave, the Operations Manager, is thrilled with the award. Andrew who has taken over responsibility for health and safety thinks otherwise. In addition to the incidents, he has discovered systemic errors in occupational health and safety at the plant. Given this situation, students are asked to explain what advice Andrew should give Dave, if any, and what further actions should Andrew take.

Keywords: occupational health and safety; lean manufacturing; SHE management; business ethics