# KPI definition sheet

One sheet defines one metric so that two people calculate it the same way and a later reader can reproduce it. Parts 1 to 8 are the eight lines of the copyable sheet on qhsetech.com/qhse-kpis-metrics, in order. What counts as a case in an injury rate is set by the scheme or rule you report under: check it, this form does not say. Write the rate base beside every rate.

## 1 Metric name

| Metric name (as it will appear on the dashboard) | Unit shown (rate, count, days) | Definition version and date |
|---|---|---|
| This metric is a ☐ Lagging (an outcome already seen) ☐ Leading (an activity or a control) ☐ Other | | |

## 2 Decision and owner

What it supports, who reviews it, who keeps the definition

| Decision this metric supports (what will be done differently if it moves) | | |
|---|---|---|
| Result that triggers action (a threshold or a trend rule) | | |
| Reviewed by (name, role) | Owner who maintains this definition (name, role) | |

## 3 Numerator

Case or completion rule, unit, exclusions

| Case or completion rule: what is counted, and what makes one case | | |
|---|---|---|
| Unit counted | Exclusions (what is not counted, and why) | Who settles a borderline case |

## 4 Denominator

Hours, units or assignments; who or what is covered

| What it measures (hours worked, units, assignments) | How the amount is obtained (payroll, time records, count; say if estimated) | |
|---|---|---|
| People, sites or products covered | Left out, and why | Same coverage as numerator? ☐ Yes ☐ No |

## 5 Period and cutoff

Event or entry date, period, deadline, late records

| Which date places a record in the period ☐ Event date ☐ Entry date ☐ Other | Calendar period ☐ Month ☐ Quarter ☐ Year ☐ Rolling 12 months |
|---|---|
| Reporting deadline (date or days after period end) | Late records: counted in the period of the event or of the entry? What happens to the published result? |

## 6 Source and version

Source records, data version, approval

| Source records for the numerator | Source records for the denominator | Extract or file version, and date |
|---|---|---|
| Definition approved by (name, role) | Approval date | Earlier version it replaces |

## 7 Missing data

N/A and the reason, not zero

| Shown when the denominator is zero or unavailable (N/A and the reason, not zero) | A zero is shown as a real zero only when |
|---|---|

## 8 Rate base

Stated beside the number

| Rate base, stated beside the number ☐ 200,000 hours ☐ 1,000,000 hours ☐ Percent | Other base, if used | |
|---|---|---|
| Formula as written (numerator, base and denominator) | Decimals shown | Base printed beside the number? ☐ Yes ☐ No |

## 9 Revision of a past result

How a published figure is changed

| How a published result is changed when a case is added, reclassified or removed, and how the earlier figure is kept | | |
|---|---|---|
| Who approves a revision | Revised figure marked as revised? ☐ Yes ☐ No | Reports and dashboards it affects |

## 10 Baseline and target

And who justified them

| Baseline (value and period) | Target (value and date) | Comparison used (and its source) |
|---|---|---|
| Who justified the baseline and target, and the reason | | |

## 11 Review frequency

| Results reviewed ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Yearly | Definition itself reviewed (interval and next date) |
|---|---|

## 12 Worked example

| Numerator (count) | Denominator (hours, units) | Rate base | Calculation written out | Result and unit | Matches the published figure? If not, why |
|---|---|---|---|---|---|
| | | | | | |

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# KPI definition sheet: second metric

## 1 Metric name

| Metric name (as it will appear on the dashboard) | Unit shown (rate, count, days) | Definition version and date |
|---|---|---|

This metric is a

☐ Lagging (an outcome already seen) ☐ Leading (an activity or a control) ☐ Other

## 2 Decision and owner

What it supports, who reviews it, who keeps the definition

Decision this metric supports (what will be done differently if it moves)

Result that triggers action (a threshold or a trend rule)

| Reviewed by (name, role) | Owner who maintains this definition (name, role) |
|---|---|

## 3 Numerator

Case or completion rule, unit, exclusions

Case or completion rule: what is counted, and what makes one case

| Unit counted | Exclusions (what is not counted, and why) | Who settles a borderline case |
|---|---|---|

## 4 Denominator

Hours, units or assignments; who or what is covered

| What it measures (hours worked, units, assignments) | How the amount is obtained (payroll, time records, count; say if estimated) |
|---|---|

| People, sites or products covered | Left out, and why | Same coverage as numerator? ☐ Yes ☐ No |
|---|---|---|

## 5 Period and cutoff

Event or entry date, period, deadline, late records

| Which date places a record in the period ☐ Event date ☐ Entry date ☐ Other | Calendar period ☐ Month ☐ Quarter ☐ Year ☐ Rolling 12 months |
|---|---|

| Reporting deadline (date or days after period end) | Late records: counted in the period of the event or of the entry? What happens to the published result? |
|---|---|

## 6 Source and version

Source records, data version, approval

| Source records for the numerator | Source records for the denominator | Extract or file version, and date |
|---|---|---|

| Definition approved by (name, role) | Approval date | Earlier version it replaces |
|---|---|---|

## 7 Missing data

N/A and the reason, not zero

| Shown when the denominator is zero or unavailable (N/A and the reason, not zero) | A zero is shown as a real zero only when |
|---|---|

## 8 Rate base

Stated beside the number

| Rate base, stated beside the number ☐ 200,000 hours ☐ 1,000,000 hours ☐ Percent | Other base, if used |
|---|---|

| Formula as written (numerator, base and denominator) | Decimals shown | Base printed beside the number? ☐ Yes ☐ No |
|---|---|---|

## 9 Revision of a past result

How a published figure is changed

How a published result is changed when a case is added, reclassified or removed, and how the earlier figure is kept

| Who approves a revision | Revised figure marked as revised? ☐ Yes ☐ No | Reports and dashboards it affects |
|---|---|---|

## 10 Baseline and target

And who justified them

| Baseline (value and period) | Target (value and date) | Comparison used (and its source) |
|---|---|---|

Who justified the baseline and target, and the reason

## 11 Review frequency

| Results reviewed ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Yearly | Definition itself reviewed (interval and next date) |
|---|---|

## 12 Worked example

| Numerator (count) | Denominator (hours, units) | Rate base | Calculation written out | Result and unit | Matches the published figure? If not, why |
|---|---|---|---|---|---|
| | | | | | |

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## 13 Change log for definitions (both sheets)

| Date | Metric | Version | What changed (numerator, denominator, base, cutoff, source) | Effect on past results (restated, flagged, left) | Approved by |
|---|---|---|---|---|---|
| | | | | | |
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A change to a definition can move a result without anything changing at work. Date it, say whether earlier periods were recalculated, and keep the old version.

## 14 Rate bases at a glance

| Base | What it stands for | From a rate per 200,000 hours | Note |
|---|---|---|---|
| **200,000 hours** | 100 full-time workers, 40 hours a week for 50 weeks a year (BLS, US). | Same figure | The base of the BLS incidence rate formula: cases × 200,000 ÷ hours worked. |
| **1,000,000 hours** | Five times the 200,000-hour base: about 500 full-time workers on the same basis. | Multiply by 5 | The same result, only scaled. Never compare a rate per million hours with one per 200,000. |
| **20,000,000 hours** | 100 times the 200,000-hour base: 10,000 full-time workers on that basis. | Multiply by 100 | BLS suggests it when comparing illness rates by type of illness. |
| **Per 100,000 workers** | A headcount base, not hours. | No conversion without hours | HSE (Great Britain) uses it for fatal injury rates; it allows for changes in employment between years. |
| **Percent** | A completion measure: done out of due. | Not a rate base | Name the cohort: what was due in the period, overdue items included. |

A group result adds the cases and the hours of its sites and then applies the formula once. It is not the average of the site rates: one case in 20,000 hours (10.00) and one case in 180,000 hours (1.11) give 2 × 200,000 ÷ 200,000 = 2.00 together, not 5.56.

## 15 Before the metric goes on a dashboard

☐ A decision and an owner are named ☐ The case rule is written and was checked against the text it comes from
☐ Numerator and denominator cover the same people, sites or products ☐ The date rule and the deadline are set ☐ Late records have a rule
☐ A zero denominator shows N/A and the reason ☐ The rate base is printed beside the number ☐ A revision rule exists and an earlier figure is kept
☐ The worked example reproduces a published figure ☐ A baseline and a target have a named person behind them

Where these sheets are kept, who can change them, and how long old versions are kept

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