



SOCIOSAFETY™ · EXECUTIVE REFLECTION WORKBOOK

A companion to the psychosocial diagnostic.

The conversation *before* the conversation.

Designed to help your leadership team see the psychosocial diagnostic, consider how it could apply in your context, and identify where the conversation needs to begin.

PREPARED FOR · WEBINAR ATTENDEES, OHS AMENDMENT BILL BRIEFING

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A NOTE BEFORE YOU BEGIN

This is a workbook for seeing, not a workbook for signing off.

Thank you for joining us at the OHS Amendment Bill webinar. This workbook is the companion piece to the SocioSafety™ Executive Snapshot you received.

Its purpose is straightforward, and we want to be honest with you about what it is and what it is not.

WHAT THIS WORKBOOK IS

A structured way to read the Snapshot more slowly.
 A set of reflection prompts to surface what the diagnostic might reveal in your organisation.
 A briefing tool you can take to your CEO, GM HR, and OHS lead before the discovery conversation.
 A way to arrive at our first meeting already aligned on the question worth asking.

WHAT IT IS NOT

It is not a do-it-yourself psychosocial risk assessment.
 Completing this workbook on your own will not satisfy Section 8 of the amended OHS Act.
 It will not produce the legally defensible Psychosocial Hazard Register the Act requires.
 The validated 84-item instrument, the Listening Circles, and the Register itself are delivered together, by trained practitioners, under defined protocols. There is a reason for that.

How to use this workbook

- Read each section alongside the corresponding page in the Executive Snapshot.
- Work through the reflection prompts on your own first, then with your leadership team.
- Note where the diagnostic surfaces something you already suspect, and where it would surface something you do not yet know.
- Bring your notes to the discovery conversation. They become the starting brief.

Christina is in South Africa for three weeks from the week of 25 May.

She would welcome an in-person discussion about how the amended OHS Act aligns to your world, and what your starting position looks like. Email her directly to arrange a time.

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SECTION 01 · THE LEGAL TRIGGER

Why this work, and why now.

Compliance is the trigger. Conditions are the work.

South African workplaces have changed materially in recent years. The amended OHS Act raises the legal floor. SocioSafety™ is designed both to meet that floor and to produce the structural insight your leadership team needs to act on what the assessment surfaces.

THE LEGAL TRIGGER The amended OHS Act now requires psychosocial assessment. Section 8 requires a workplace-specific written risk assessment covering all hazards. Psychosocial is included. Section 16 places personal accountability on the CEO. Administrative fines and criminal liability are now on the table.	WHAT EXISTING WORK MISSES Engagement surveys and wellbeing programmes are not equivalent. Engagement surveys measure how engaged staff feel. Psychosocial assessments measure the structural conditions that determine whether the workforce can sustain its work. The two are related. They are not the same.	THE DESIGN INTENT Defensibility, insight, reciprocity; all three. The methodology meets the legal floor. It produces structural insight that lets leaders act. It treats the workforce as participants whose voice carries forward into change rather than as subjects of an extractive exercise.
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Reflection

01. Where is your organisation today in relation to the Section 8 written risk assessment requirement for psychosocial hazards?

02. Who currently holds the answer to that question in your organisation and how confident are you that the answer would hold up under inspector challenge?

03. What existing work (engagement surveys, wellbeing programmes, EAP data) is already in motion and what do you suspect it is missing?

SECTION 02 · THE BOARD-LEVEL QUESTIONS

Three questions every board should be asking now.

These are not rhetorical. Each one corresponds to a specific obligation under the amended Act. Work through them honestly, on your own, before the leadership team reviews them together.

01

Does our CEO have a signed, documented Health and Safety Management System under continuous review?

Section 16 personal accountability. Not delegable.

02

Does our risk assessment include psychosocial hazards, with documented controls?

Section 8 covers all hazards. Including the ones the Bill does not name.

03

Have we asked the workforce, in a structured way they trust, about the conditions of their work?

The reciprocity test. The workforce knows. The question is whether the leadership team is listening.

Your honest answers

Question 01. Your answer, and the evidence behind it.

Question 02. Your answer, and the evidence behind it.

Question 03. Your answer, and the evidence behind it.

SECTION 03 · THE SIX DIMENSIONS

What the assessment measures.

Each dimension rests on a validated theoretical foundation. Workload and Autonomy on the Job Demands–Resources and Job Strain models. Recognition and Fairness on Effort and Reward Imbalance. Community and Values congruence on Ubuntu leadership scholarship. The integration is what gives the methodology its specific character.

The full instrument covers fourteen items per dimension. What follows is the framing of each dimension, with space for your initial impression.

DIMENSION

01

WORKLOAD

Whether work demands can reasonably be met in the time and with the resources allocated.

POOR PERFORMANCE LOOKS LIKE

Workload inferred from self-report. Emotional labour invisible. Managers absorb concerns. Staff describe the work as no longer being the work they trained for.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

DIMENSION

02

AUTONOMY

Whether people have meaningful agency over how, when, and in what sequence they do their work.

POOR PERFORMANCE LOOKS LIKE

Work instructed in detail by systems or supervisors. Decisions announced to teams after they are finalised. Practice narrows to the protocol envelope.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

DIMENSION

03

RECOGNITION*Whether contribution is seen, fairly assessed, and proportionately rewarded.***POOR PERFORMANCE LOOKS LIKE**

Contribution beyond the role is invisible. Remuneration parity not reviewed.
Recognition annualised and delayed. Promotion criteria opaque.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

DIMENSION

04

FAIRNESS*Whether decisions about people are made consistently, transparently, and with the same standard regardless of seniority.***POOR PERFORMANCE LOOKS LIKE**

Underperformance addressed at junior levels and accommodated at senior.
Decisions announced without explanation. Commercial pressure overrides fair process.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

DIMENSION

05

COMMUNITY*Whether the social environment supports people or depletes them.***POOR PERFORMANCE LOOKS LIKE**

Processes for raising concerns exist on paper but are not trusted. Senior leaders with difficult behaviour protected because commercially valuable. Cultural diversity smoothed over.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

DIMENSION

06

VALUES CONGRUENCE*Whether the work people are asked to do is consistent with what they were told they were joining.***POOR PERFORMANCE LOOKS LIKE**

Public values and internal operating decisions diverge. Staff describe the organisation in terms that no longer match the recruitment promise. Values abandoned under pressure.

Your initial impression: where would you place this dimension in your organisation today?

What evidence are you drawing on for that impression?

SECTION 04 · PATTERNS

Five patterns we surface most often.

These are not diagnoses. They are recurring shapes that the data tends to settle into. As you read them, notice which one feels closest to what your organisation might surface.

01	STRUCTURAL DEFICIT Workload + Autonomy critical. Others stronger.
02	EXCHANGE DEFICIT Recognition + Fairness critical. Others stronger.
03	RELATIONAL DEFICIT Community + Values critical. Others stronger.
04	SYSTEMIC DEFICIT Three or more dimensions critical. Full framework engagement required.
05	HIDDEN RISK Aggregates strong but qualitative work surfaces concentrated risk.

Which pattern do you suspect would be closest to what a SocioSafety™ engagement would surface in your organisation? What makes you say so?

SECTION 05 · HOW THE WORK IS DONE

Four phases. The workforce voice carried through.

The work is delivered in four sequenced phases. Listening Circles — structured small group conversations run by a trained practitioner — sit alongside the quantitative instrument. Findings are integrated. The output is a defensible Hazard Register and a Culture Assessment Report your board can take.

PHASE 01	PHASE 02	PHASE 03	PHASE 04
Pre-launch	Launch	Window	Close + handover
<i>1–2 weeks</i>	<i>1 day</i>	<i>7–10 days</i>	<i>2–3 days</i>
Scoping. Leadership team prepared. Communications drafted. Platform configured. Union consultation where relevant.	CEO sends staff communication. Survey link follows. Tracking begins. Leadership team has already completed.	Daily participation tracked. Two reminders. Low participation investigated quietly with line managers.	Threshold verification. Data integrity. Anonymity preservation. Handover to qualitative phase.

Listening Circles: the workforce voice

Structured small group conversations, run by a trained practitioner. Not focus groups. Organised around the dimensions where the survey data is strongest, weakest, or most divergent. Six to ten Circles in a Standard engagement, ninety minutes each, stratified randomly across the workforce.

The promise the Circles carry.

The workforce gives the assessment its time and honesty. In return, what they surface is heard, carried forward into findings, integrated with the quantitative data, and translated into a response architecture the leadership team commits to. The legal flag protocol holds the protections that make the conversation possible.

A note on what cannot be DIY

The reason this workbook is not a do-it-yourself instrument is not commercial gatekeeping. It is structural. Three things in particular cannot be improvised:

- Anonymity protection: responses go to the assessor, not to the employer. No IP logging. Minimum response thresholds protect small reporting groups. These protections are what make honest answers possible.

- Randomised instrument deployment: the 84 items are presented in randomised order, with dimensions invisible to participants and restored at analysis. This is what protects against response set bias and gives the result its defensibility.
- The legal flag protocol in Listening Circles: practitioners are trained to hold the protections that allow people to speak honestly about conditions they are otherwise required to absorb in silence. Without that protocol, the conversation produces noise, not signal.

SECTION 06 · WHAT YOU WOULD RECEIVE

Four deliverables, structured for board-level use.

A SocioSafety™ engagement produces four integrated deliverables. They are designed to sit inside the formal governance record.

01 · PSYCHOSOCIAL HAZARD REGISTER Named hazards, severity, evidence base, controls. Integrates into the HSMS. Defensible under inspector challenge.	02 · CULTURE ASSESSMENT REPORT Narrative findings. Patterns, structural conditions, recommended response architecture. The board takes this.
03 · DIAGNOSTIC DASHBOARD Visual summary. Dimension scores, radar, heatmap, perception gap data, OHS Bill defensibility summary.	04 · EXECUTIVE SUMMARY Two pages. Suitable for board minutes and HSMS sign-off. Sits inside the formal governance record.

Of the four deliverables, which one would your CEO most need to see first, and why?

Which one would create the most discomfort if surfaced today, and why?

SECTION 07 · PREPARING FOR THE DISCOVERY CONVERSATION

The starting brief.

The discovery conversation is ninety minutes. No obligation.

Who attends: your CEO, GM HR, and OHS lead. Where the workforce is unionised, the key shop stewards or officials briefed alongside.

What it establishes: the starting conditions, the trigger for the work, the scope and timing, the framing language, and the Assessment Plan that becomes the operational reference.

The question worth asking

If your organisation commissioned a SocioSafety™ assessment in the next ninety days, what is the finding you would most want it to surface, and what is the finding you would most fear it surfacing?

The two are usually the same finding. The honesty of that recognition is, in our experience, the starting point for the work this workbook describes.

Your notes ahead of the conversation

The finding I would most want a SocioSafety™ assessment to surface in our organisation.

The finding I would most fear it surfacing.

The single decision the leadership team has been postponing because we do not yet have the evidence to make it.

Who, on our leadership team, most needs to be part of this conversation, and who would most need convincing?

WHERE TO FROM HERE

The next conversation.

If, having worked through this workbook, you would like to take the conversation further, there are two ways to do that.

01 · WHILE CHRISTINA IS IN SOUTH AFRICA

Christina Foxwell, our CEO, will be in South Africa for three weeks from the week of 25 May. She would welcome an in-person discussion about how the amended OHS Act aligns to your world — what the trigger is, what your starting position looks like, and what a SocioSafety™ engagement could surface.

Email her directly to arrange a time:

christina@ignitepurpose.com.au

02 · THE FORMAL DISCOVERY CONVERSATION

A ninety minute structured session with your CEO, GM HR, and OHS lead. No obligation.

This is the meeting that produces the Assessment Plan — the operational reference that scopes any subsequent engagement.

Book directly:

ignitepurpose.com.au/discovery-call

What else you will receive from us

- A recording of the OHS Amendment Bill webinar, sent separately.
- A sector-specific white paper for your industry, summarising the research evidence and outlining the considerations that should shape your next actions.
- A LinkedIn article in three weeks, tailored to leaders in your sector.

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