Procedure Writing Workshop

Well written and managed procedures help to ensure that the right people do the right things at the right time.

Pegasus Consulting Support were asked to develop this workshop by a client site which had experienced a serious accident. The subsequent review and investigation led to a review of site standards and revealed the need to improve the quality of procedure writing.

Objective

To develop knowledge, understanding and skills to write procedures according to demonstrated good practice.

Programme (1½ days)

Times		Refreshments
8:30 – 9:00	Registration	Tea and Coffee /Water
9:00 – 9:15	Introductions	
9:15 – 10:45	Procedure structure and layout including Task Breakdown, definition of hazards, use of safe states /hold points, critical sub-tasks and key checks	
10:45 – 12:15	Exercise 1: Define structure and task breakdown for example Task including hazards, safe states /hold points, critical sub-tasks and key checks	Tea and Coffee /Water
12:15 – 13:00	Lunch	
13:00 – 13:30	Exercise 1 Feedback	
13:30 – 14:00	Procedure style and physical legibility	
14:00 – 15:30	Exercise 2: Write section of procedure for example Task applying style and physical legibility guidance	Tea and Coffee /Water
15:30 – 16:00	Exercise 2 Feedback	
Day 1	Close	
Day 2	Start	
8:30 – 9:15	Importance of user involvement	
9:15 – 9:45	Job aids and factors supporting task performance	
9:45 – 11:00	Exercise 3: Develop job aids and identify supporting factors for the example Task and resource plans for procedure writing within own business team	Tea and Coffee /Water
11:00 – 11:30	Exercise 3 Feedback	
11:30 – 12:00	Discuss and compare procedures developed by groups	
12:15 – 12:45	Close and Lunch	

The workshop is highly interactive and can be tailored to include client specific case study tasks in the practical procedure writing exercises. The workshops focus on human and organisational factors, which influence the effective preparation and application of procedures supporting task planning and execution. As well as procedure writing good practice principles and examples (such as the value of job aids); this includes the limits of compliance, the challenge of adaptation and supporting influencing factors. The workshop provides the skills and knowledge for organisations to close the gap between best practice and preferred practice during task execution.

# Example Job Aids Developed by Delegates, Delegate and Client Feedback
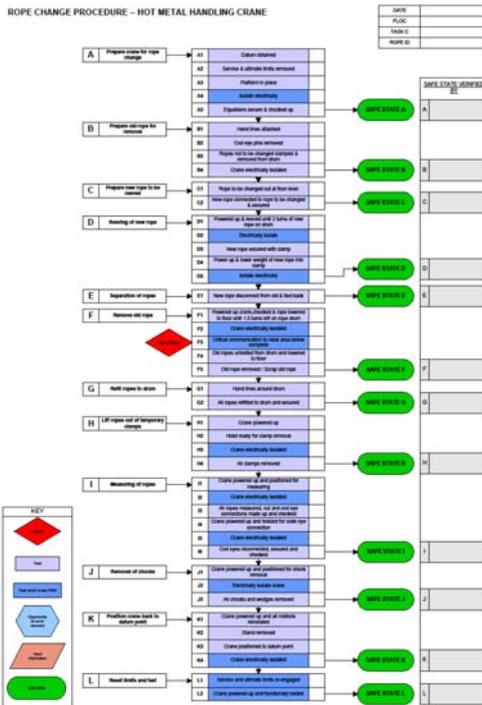
Delegate feedback:

- ▶ *'Good techniques for higher and lower risk tasks'*
- ▶ *'The workshop was very effective and I will have to go back and review our current procedure system'*
- ▶ *'Liked being challenged on our normal ways and 'unblinkered'. The exercise group mix allowed diverse discussion'*
- ▶ *'Helped by giving a real way of applying human factors solutions in the workplace'*
- ▶ *'The manual is an excellent tool, will use for future procedures'*
- ▶ *'Job aid logic is very good'*
- ▶ *'Workshop exercises helped to draw out understanding'*
- ▶ *'This is an essential training course going forwards'*
- ▶ *'I thought the course was excellent, often the discussion clarified the point. Helen and Dave, thank you for your time and facilitation'*
- ▶ *'Very good course, should be delivered to the central team and senior management to better understand what is required'*

Client Health and Safety Manager: *'Why a procedure writing course? Well it's not just a procedure writing course! It's about critical tasks and how to control them through appropriate procedures. These procedures define the process to follow to ensure that hazards and risks are suitably controlled.*

Have you ever sought feedback on a procedure you've written? If not, try it, you may be surprised by the feedback. Often, we safety professionals and managers think we know the required detail. However, those who do the work often know best. Common procedure weaknesses include: failure to identify the task specific hazards, repetition and stating the obvious. Unnecessary detail, such as general site PPE requirements, masks the importance of task specific hazards and controls, which need to stand out.

Personally, it gave me clarity on achieving adequate content, confidence to write procedures knowing I have a robust approach and it demonstrates competence. I have a former colleague who, when interviewed by UKHSE during an investigation, was asked: "What competencies do you have to write a safety critical procedure?"'
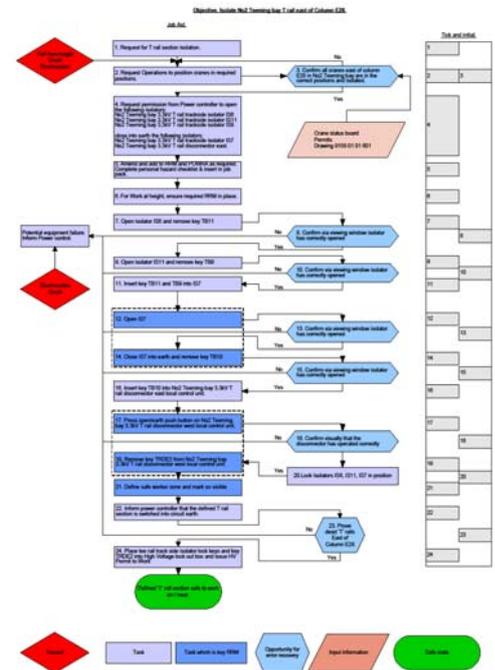
Pegasus Consulting Support Clients

Aquatera	Tata Steel Projects
Bindmans LLP	TOTAL LOR
Ecologic	Unilever
GrowHow	
Murco Petroleum	
Tata Steel	

Contact Details
Helen Conlin
T +44 (0)1490 720450 **M** +44 (0)7891 841154
E helen@pegasusconsultingsupport.com

Pegasus Consulting Support
Paradwys, Bryneglwys
Near Corwen, Denbighshire
LL21 9LL, UK