

## DEVELOPING SAFETY PROCEDURES

There are only a few simple rules to developing a safe operating procedure. Most of the rules are common sense. Think of them in four main categories:

- Objectives in writing a procedure
- Audience (your employees)
- Format to reach that audience
- Style of writing that will make procedures clear and easy to understand

### Knowing your objectives

It will be impossible to develop effective safety and health procedures unless you have a clear idea of what you want them to help accomplish. For example, your objectives might be to:

- Reduce the number and severity of accidents
- Reduce lost time
- Cut the cost of workers' compensation and liability insurance
- Educate workers' families in good health and safety practices
- Improve morale and cut the need for time off
- Provide a written record of safety instruction
- Provide a basis for discipline when rules are ignored
- Provide a basis for further improvement of safe practices
- Comply with government regulations

### Know your Audience

You are addressing safety procedures initially to supervisors, trainers, and other members of management who will interpret and enforce company regulations on safety and health. Your ultimate audience, though, is usually the employees who will follow the rules. You may also be writing for your employees' families, contract employees who work at your company, corporate management, and eventually your unions, your auditors, even OSHA and other local, state, and federal regulators.

You must know who will be using these procedures as well as in what environment. For example, will they most likely be read only in an emergency, or will they be read before a procedure (task) is undertaken for the first time? This information will help you decide about such elements as page design (plenty of white space, use of bold type, for example) and supporting graphics that might help you get your instructions across.

Your readers want you to succeed; they want the rules to help them all stay safe and healthy. Know the particular risks that your employees face at work in your company every day. You should also know about unexpected situations that employees might not ordinarily think about, that have been mentioned by industry associations, government agencies, insurance firms, consultants, and others.

Think like a salesperson. The requirement of knowing your audience is no different from the questions faced by your sales and advertising people. They can't market your product unless they know who the potential buyers are, and the particular needs of those buyers. For you to sell safety, you must also know your company and your industry. You can't expect a chemical worker to follow the same safety rules as those for a power company line repairer.

Know the reading level of your audience. You needn't insult your readers by talking down to them, but even more important, don't talk over their heads. If your employees have no more than a grade school or high school education, don't write safety procedures that sound like doctoral dissertations. In some situations, the question may be "Can they read?" Or, "Do they read English?"

### Using an Effective Format

Choose a format that makes it easy for the employee to find a specific rule when a safety or health question comes up. It doesn't help to have a comprehensive manual of safety regulations and procedures if it isn't easily available to employees, or if it's difficult to find the rule they need.

For the comprehensive manual, a good format uses a standard 8 ½" by 11" page, hole-punched for insertions in a standard binder. (A particular advantage of this format is that it can be updated easily – you don't have to choose between, on the one hand, reissuing the entire manual for changes in a few procedures and, on the other, retaining manuals that provide employees with outdated material.) Here are some additional pointers:

- Print the company name (or even better, the logo, which takes less space), the manual name (if there is more than one company manual), and the procedure title at the top of each page. The title should be brief (five words are usually enough).
- If your manual is divided into sections, the name of the section should be shown.
- Most important is a procedure number, usually at the top right, for ease of filing and later finding.
- Include the date of issue, and identify the procedure as new or revision.
- The page number should be shown as "Page 1 of 3" so the reader will know if a page is missing.
- Some companies list approval initials and dates, but these approvals take up space and are not needed if the transmittal memo is signed by the authorizing executive.

### Consider the Computer

Many companies keep their procedures on computer, for ease of writing and revising. Some companies that have microcomputers throughout the plant go a step further, making their safety procedures available to employees through local workstations tied to a mainframe computer, or by personal computers networked together. When this happens, an employee or supervisor having access to a workstation or PC can quickly call up a procedure by number, name, or subject.

It may be most effective to use both the written and computer versions, however, as some employees are more comfortable with one format than the other, also, an emergency could cause loss of power, with workstations down. With procedures on computer, you need not lose the advantage of having an employee read through a procedure when it is issued – or when the employee files it in a manual – if you call attention to new procedures and changed safety requirements with a memo or electronic mail notice.

Your manual should have a Table of Contents. Whether it is in print or on computer, you should update it at least once a year.

### Mini-Manuals

Some companies issue reduced-size safety manuals, small enough for the employee to keep in a pocket or other convenience place. They usually include only the most important safety procedures. These small

manuals can be reprinted every year or so, provided that current manuals with all revisions are maintained in accessible locations.

Most companies give new employees a booklet containing guidelines to their safety and health regulations, as well as personnel practices and other company policies. These guidelines are general in content. The updates can also be given to veteran employees, helping to keep them current on company policies.

### Preparing Readable Procedures

The most difficult step is writing procedures that are clean, easy to read and understand. It's up to management to see that the instructions are distributed to supervisors and employees (this part is easy), that they are read and understood, and that the employees then follow these safety instructions. Some might say that employee compliance is the hardest step-but it certainly can't be achieved if the instructions aren't understood. The following tips should help ensure understanding.

Write an introduction. Before plunging into the procedure text, it is nice to have a brief introduction, explaining the purpose and scope of the new procedure or the significance of revisions to existing procedures. Some companies indicate here who is responsible for enforcing the procedure. The introduction need not go into great detail; the detail belongs in the text that follows. The introduction is helpful, not only to the reader, but also to the writer. It requires defining the objective of the safety procedure: "What are we trying to accomplish? Do we need this procedure at all? If this is an important safety matter, what is the best way to tell it to the employee?"

Make an outline. Because a safety and health procedure should be a very precise document, it deserves to be written carefully. Time and effort will be saved, if you make an outline listing the points that should be stressed, and the best order to present them. Then organize your points in that logical order, and start writing.

Write with precision and clarity. The amateur sometimes gets wordy when first asked to write. Remember that you're trying to get an idea across to another human being. So try to write clearly. Use precise words, that mean something to you – don't feel you must use long or complex words or sentences. Treat the reader as you'd want to be treated by the boss. If you're receiving a project or even a brief instruction, you have a right to know what your superior expects. You don't want to hear mumbles, or language you don't understand. So give your reader a break:

- Use action verbs, and write in the present tense; use the imperative ("do it," not "You should do it" or "It will be done" or "It should be done"). Write as though you were talking to the person doing the procedure at the time.
- Keep your sentences short. If you have a very long sentence, break it into two or more thoughts, and make each thought a separate sentence.
- Avoid jargon. If you are referring to technical material, such as OSHA standards, write in everyday language. Explain technical terms, and spell out abbreviations, if not everyone will know what you mean.
- Keep your paragraphs short; each should express a separate idea.
- Illustrate your ideas with written examples, or even with graphics. (If you use a computer, desktop publishing and graphics software can make a manual more attractive – and therefore, more likely to be read and remembered.) Some people are visually oriented, some prefer words, still others
- numbers. Try to include a flowchart, a diagram, a chart, a picture, or some other example when it will help clarify your words in the text.

- Put ideas in a positive way. It's better to say "Do the job this way, because it's safer than "Don't do that, because it's dangerous."
- Try to keep the procedure itself to a reasonable size. A one-, two- or three-page procedure is readable. Ten pages may seem threatening or boring to the reader. The reader is usually looking for an answer to a specific situation, and may get lost if your procedure tries to cover a complex process all at once. Go back to your outline: it may suggest how to break up your long text into several manageable short procedures. Or, if you must keep the text in one comprehensive procedure, divide it into sections, clearly identified by subject and page number on the first page.

Summarize, test, and check. When you're all done, summarize (for yourself) what you've written. Compare the text with your introduction and your objectives. Did you write what you said you would? Does your procedure fit the scope you mentioned in the introduction? If not, revise either the introduction or the procedure.

Have an end user test your draft, by trying to follow it. This can be a great help in pinpointing words, phrases, or paragraphs that are unclear.

Finally check your writing for spelling and punctuation. It would be embarrassing to have typos in something official, like a safety and health procedure.

### Preparing Guidelines

When writing guidelines (such as general information on safety and other matters for new employees), follow the same approach as for procedures, but you may be explaining rather than instructing. For guidelines such as policy summaries or company and plant regulations, write explanatory material as statements ("So and so is done" rather than "Do it this way"). Give examples when helpful don't assume the reader understands.

Write guidelines in a consistent format: headings, indents, boldface type, plenty of white space.

### Preparation Can Be Painless

Developing safety procedures and guidelines can be relatively easy, even fun, and certainly rewarding. Just put yourself in the reader's shoes, and write the sort of straightforward, clear procedure that any reader is looking for. The reader wants to stay out of trouble, avoid injury, and do an effective job for the company. You can help. It's important work, and if you'll follow the simple rules mentioned above, it can be a fulfilling experience.

In summing up, your effort can make a difference in making your company more productive and in keeping your fellow employees safe and healthy. What more could you ask?

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Date