

SOLUTION IN A CHECKLIST!



by Ir. Shum Keng Yan

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In the previous article, we looked at starting a Behavioural Observation process with the use of a Behavioural Observation card which will essentially have elements to observe and tick off. We all use checklists, either a physical checklist or a mental checklist.

Checklists are great! It helps me remember my routines. Routines enable me to be consistent all the time, without missing a beat! This wonderful invention is used everywhere, from airlines to hospitals and the production shop floor to my personal self so that I will not forget something.

What really is a checklist? How does a checklist function? In its most basic form, a checklist serves the following functions:

1. A broken down step-by-step standard process to be followed.
2. A quick aide-memoire on all the major items that we should not forget.
3. A control check that the process is followed and counter-signed.
4. A record that a certain sequence has been completed.
5. A documentation created as a governance.

Whatever the intention, we cannot escape from a checklist. This has its uses and its drawbacks. Here are some factors to consider:

1. Enlist users to sit together and come up with a checklist for their own place. This drives ownership and is more realistic.
2. Think through if the checklist can really add more value or marginal improvement based on the risk at hand.
3. Find alternatives to checklists, such as designed in behavioural nudges and Poka Yoke. These will reduce the number of checks as they are visual and suggestive.
4. Focus on the intention of the checklist in the first place. Does it drive results or is it another administrative layer?

Let us look from the context of Behavioural Safety Observation. Again, my emphasis is that in the initial stages, keeping a record, perhaps through Behavioural Observation Cards, will enable the proper observation process to be carried out. A well-designed card is actually a breakdown of the sequence of the observation process, the items to look out for and the learnings. It closes with an acknowledgement by both the observer and observee of the learnings and the recognition to each other for the willingness to make the workplace safer. The learnings are then replicated to other similar areas.

That sounds about right except that, in the workplace, it is common that this degenerates into a tick-the-box mentality. How often have you seen a matured Behavioural Observation programme turn into a "meet the number of cards per month" target? In fact, cards almost always seem to come in at the last week of the month to meet the target!

Here is a thought: Perhaps as the Behavioural Observation process matures, so should the learning process. We can start with observation cards. How will it look as we mature?. If you have done it, just tick it off and send your checklist to me at: pub@iem.org.my. ■

"Don't be afraid to have a reality check. Taking risks is OK, but you must be realistic." Joy Mangano