



**Announcer**

It's time for the *IHSA Safety Podcast*.

**Ken Rayner**

Welcome to the *IHSA Safety Podcast*. I'm Ken Rayner, and I'm your host. And on this edition of the *IHSA Safety Podcast*, we're joined again by Maren Gamble, IHSA's Manager of Strategic Programs. Maren, welcome back to the podcast.

**Maren Gamble**

Thanks, Ken. I'm really excited to be here.

**Ken Rayner**

I am too, because we've done some podcasts on occupational health and safety management systems, and this one to me is more of like the ABCs of management systems, because we're going to talk about the concept of "plan, do, check, act". And I am really excited to get into this with you, because I think it's going to provide hopefully for our listeners a little more clarity on management systems in general, and provide a little bit more of the ABCs of that. So maybe we can jump in Maren, let's start. We're talking about the Plan, Do, Check, Act (PDCA) model, we're talking about management systems. Where do you suggest we start with this discussion today?

**Maren Gamble**

It's a good question, Ken. I think you said it well when you said that we're going to the ABCs, it's really a back to basics kind of conversation, because it's one of those things where you need that strong foundation that you're building from, you need to start with those ABCs, or you can never develop fully what you're trying to do. So with that in mind, I think if we're going to talk about occupational health and safety management systems, we should actually start with what that is. So it's a lot of words in a row, but what does that actually mean?

And if we look at one of the definitions that's out there, I like to look at what the *Occupational Health and Safety Act* has, because it's one of those documents that gets referenced frequently in our industries. It says that it means a coordinated system, procedures, processes, and other measures that is designed to be implemented by employees in order to promote continuous improvement in occupational health and safety. So some really great pieces in there. It's a coordinated system of procedures, processes, and other measures. So basically, it's all the bits and pieces that you can possibly put together. It's not just your policies, it's not just your procedures, it's not just your standards, whatever the language is around documentation in your workplace, it's actually about how all those different pieces fit together to coordinate into something more holistic.

**Ken Rayner**

Right on. And I don't want to nitpick about the definition in the *Green Book*, but the only piece that I would love to add to that is consistency. Because isn't that what we're talking about here? This PDCA concept, the management systems implementation, it's about being able to do all of what you said, but consistently across all of your workplaces, across all of your sites, across all of your properties, it's being done in a consistent manner. That's the one piece, not to take anything away from the green book-

**Maren Gamble**

I would agree.

**Ken Rayner**

... but I'd love to have that consistency piece added too, just to make sure that there's clarity in that.

**Maren Gamble**

I mean, consistency is at the heart of systems development, period. That's what you're looking for.

**Ken Rayner**

One hundred per cent. So why PCDA specifically? Why are we talking about this today?

**Maren Gamble**

So one of the things that's also in that definition is this idea of continual improvement. And when we're talking about continual improvement, PDCA is kind of the concept that you'll eventually come across no matter where you're looking. It's not something that's IHSA's proprietary blend of concept components, this is something that has been around for decades upon decades, and being applied in a variety of different management system types, and is proven to work when you use it as a concept, and as a concept to drive continual improvement. So it really aligns with the concept behind the occupational health and safety management system itself. And so when we look at PDCA, it is really just something that you can use and apply as universally as you want.

**Ken Rayner**

Okay, Maren, so how about we unpack each one of them? Let's get into a little bit more about PDCA in each one of those stages.

**Maren Gamble**

All right. So starting with the plan, we think about what we need to achieve. When we're thinking about a plan it's what is our goal? What are the outcomes we want? And in order to get there, what are the objectives and processes that we need to establish for that?

Moving on to "do", once we know exactly where we want to end up, and we have an idea of how we're going to get there, that's when we can actually do the "do". Do things that are going to get us to those objectives, and follow the procedures that we established in the previous step. A lot of the work is

actually in that plan stage, where you figure out what you're going to do, and then in the do stage, you're simply following that outline that you already built for yourself.

What it also lets you do is go into the check phase once enough time has passed, knowing what you're checking. So in the plan, again, we figured out what our goals were, we figured out how we're going to know if those goals are accomplished, and the check phase is really doing that. Did we end up where we hoped? Did we end up somewhere completely different? Did things get carried out the way that we thought they were, and are there any opportunities for us to improve? Along with that, we can also identify if we have any successes. Sometimes things do go really well, or even better than we thought, and it's important for us to acknowledge that those successes exist as well.

Whatever we identify in that check phase, the beauty of the act phase is that that's when you get to decide what you're going to do with that information. If it's a success, you do still want to take action, you don't just want to keep that quiet and file it away somewhere. It's important to acknowledge those successes to the people who were involved as well, so that they know that the efforts that they put in are doing something. But if it is something that needs an improvement, you can actually make a plan to start the plan again. And actually that's where this becomes a cycle, so you can put those actions, those gaps that you've identified right back to the beginning of this cycle, so that you can move through it iteratively to continue improving your system.

### **Ken Rayner**

You know, Maren, that reminds me of an article that you contributed to in the *IHSA Health and Safety Magazine*, I think it was in 2022, where you compare the PDCA model to baking a cake, and following a recipe. It was fantastic. It was a great article. We'll end up posting that on the podcast channel so our listeners can reference it.

I was thinking of you checking the recipe, looking at a cookbook, then as you're doing it, you've got your mixing bowls out, and adding whatever you're going to be baking or cooking that day, and then you're checking to see how it's coming along in terms of in the bake process. When it's in the oven, you're turning on the light, looking at it. Maybe you're sticking a toothpick in to see if it's ready or things like that. And then you're tasting it to see ultimately, how did I do? And if something went amiss, then you start over again, and now you change the plan, and obviously you make some changes.

So thank you for that. That helped me, and I've been associated with plan, do, check, act for a while, but that helped me in terms of as you were going through it. So great example, and I hope it helped our listeners too. So what about us sort of getting good practice at the PDCA? How do we build our skills at that?

### **Maren Gamble**

So practice is the word, Ken.

### **Ken Rayner**

Oh, there you go.

### **Maren Gamble**

Just like if I'm thinking about teaching my kid a sport, or a musical instrument, they always say practice makes perfect, and that's really what it is with PDCA as well. You referenced the ABCs earlier, we've been practicing the ABCs for a long time, most of us, sometimes longer than we want to acknowledge on a podcast, but it's that practice that makes us so comfortable with those base components. And that's really what we need to do with the PDCA cycle as well, is practice them in a variety of different contexts. So those are not just concepts, they're concepts that we know how to use, and underline what we're doing.

So we're talking about the recipe idea, we can sort of apply that. It's normally something we would think about informally, I'm not suggesting I would normally sit down and formally write plan, do, check, act for baking a cake, but if you think about how it applies, just like you outlined a minute ago, Ken, with all those details, that's going to protect you from leaving out the eggs, or switching the salt for the sugar, and having these things happen as you go down the road. So you really can apply them to everyday concepts, and then practice them and build them into the more complex systems that we talk about when we talk about occupational health and safety management systems. Because I would never want to underplay the complexity that does get involved in terms of developing those systems for the first time within organizations.

**Maren Gamble**

Absolutely. So your example of the recipe and baking something, and now you said we should continue to practice, and you get better as you practice. So let's keep practicing. Could we do that, Maren? All right, could we come up with another fictional sort of example? And let's walk through it in terms of PDCA to really understand how if we want to optimize our end result, planning is going to allow us to do that. And there's lots of adages out there, even if you say, "Measure twice and cut once." Isn't that along the lines of plan, do, check, act, in terms of just let's put work, and time, and effort into the planning phase, because that's ultimately going to have an effect on your "do"?

**Maren Gamble**

I love that you mentioned those adages, because so many of them, you can almost envision how that came out of the check phase of something, where something went wrong, and essentially, the adage is the action taken to remember that the next time you're planning, that better be a part of it.

**Ken Rayner**

Absolutely.

**Maren Gamble**

And so a lot of those sort of idioms that we're used to hearing, you can just picture the bad day that happened that led to those things being established.

**Ken Rayner**

For sure. So what type of example do you want to use so that we can flush this out a little bit more and better understand what we do in the plan phase for sure?

**Maren Gamble**

All right. So honestly, the world is our oyster here, Ken, to use another sort of phrase. But it is the middle of the summer when we're recording this, and it is beautiful outside, so I'm thinking about a visit to the lake, and let's think about what we might be planning for around the lake.

So hypothetically, let's say we're at a cottage, I guess, and our favorite fish fry restaurant is across the lake, and it's only really serviceable by boat. We know that from being there, it's a beautiful restaurant, we love it, the views are breathtaking, and it's got an amazing staff there to help us. We just really want to go to this place for this fish fry. In order to do that, there are a few things that would need to happen. It is across a lake, we are talking about going to a facility, there's different factors that would come into play. This is a fairly straightforward regular life example, rather than an occupational health and safety management systems, but we can still apply the PDCA model. How are we going to get to this restaurant? We really want to have this dinner.

**Ken Rayner**

I do. Listen, I'm hoping this isn't fictional, because the way you've built it up so far, I'm looking forward for us taking this trip, Maren.

**Maren Gamble**

That's great.

**Ken Rayner**

Yeah.

**Maren Gamble**

So we know we want to do this, it feels worthwhile, we know there's an opportunity, essentially, that is drawing us over to do this. Before we can really start planning though, we really need to not only outline our goals, but also any threats to the process. So anything that's going to be a challenge, a hiccup, and any sort of pieces of that component... Of that, sorry, process, that we're going to need to develop in the plan stage. So there really is almost a pre-planning moment when you're identifying what you're going to build a plan for that needs to get some attention as well. So let's think about the risks, Ken, in terms of crossing this river before we can start planning, what are some of the threats that you could come up with based on this scenario?

**Ken Rayner**

We didn't get into how far across the lake the restaurant is. So let's just say maybe it's a kilometre or two, so it's a good ride, a good maybe 20-minute ride across the lake. Are we comfortable with the forecast? Is there going to be a storm that comes up halfway across the lake? Or is there a storm that

comes up while we're on the other side of the lake? So are we aware of what the weather's going to be like for the day that we cross?

**Maren Gamble**

Beautiful. Those are some great examples. Other questions we might ask ourselves is, maybe we don't have a boat, are we renting a boat to do this? In that case, there's going to be some questions about the conditions, the policies, the rental facility that we need to ask. We're going to ask questions about what happens if there's some sort of incident or accident when we're out on the water, and do we have communication to help us if we're out there and an incident happens? I think if we keep brainstorming, Ken, we could probably come up with a dozen things, and I think those people listening might be coming up with their own ideas as well, the threats that we need to plan for.

**Ken Rayner**

Yeah. So I mean, I don't even know, Maren, we've never talked about it, I don't even know if you're a swimmer. I don't know how strong of a swimmer you are. Are we clear as to what legislation in Ontario applies to us taking that boat across the lake, and what we need to know about... If anything, have we had any training depending on the size of the outboard motor, or the size of the boat? Is there anything that we need to know about docking, or tying the boat up, or getting in or out of the boat in particular? How about fueling in terms of gas, or... Yeah. Wow, when you... Oh, boy. You know what? I-

**Maren Gamble**

It gets big fast, huh?

**Ken Rayner**

Oh man, I just remember the last time I jumped into a boat with no planning, I'm just so glad everything went well, as opposed to something happening, because I don't think there was any planning last time I went on a boat trip.

**Maren Gamble**

Well, and I think what we've landed on here is, when you start thinking about those risks, it can get quite expensive quite quickly, and you can start to get overwhelmed. And in fact, this is where plan, do, check, act comes in to help you focus in on tackling it one step at a time. So right now, if I were to look at this in terms of our pre-planning, I'd say we have this objective, we really would like to successfully make it to this restaurant and back, and have that dinner that we're hoping to have. But the threat that we're seeing, and that is a real threat, is that one way or another, we fail to get there. And that could be varying degrees of failure, and varying degrees of risk attached to that. But essentially, we're trying to avoid not getting there, and accomplish getting there. And at the end of the day, we've now pre-planned, because now we know actually what we're trying to avoid, and what we're trying to accomplish, which will allow us to actually frame that plan to move between that threat and that opportunity, and travel between those two.

**Ken Rayner**

Maren, depending on the experience that you and I have with boats, would we want to reach out to somebody that either we know, or maybe is an authority on it just to make sure that we haven't left out anything significant in our planning?

**Maren Gamble**

We definitely would, Ken. I actually think that that's an amazing piece that we need to talk about in terms of the plan stage. So I think that's a pretty good segue into tackling the plan for excursion.

**Ken Rayner**

And I should state that that plan segue wasn't planned.

**Maren Gamble**

There you go. There you go.

**Ken Rayner**

So Maren, we've gone through, and we've identified some threats and opportunities, and we're now ready to go to the plan phase? We've assembled enough of information to say, "Okay, now we can assemble a plan." Is that what we're doing next?

**Maren Gamble**

Yeah. I mean, the pre-planning stage is really just about taking a look around you, determining what do you need, what is your environmental scan, or your gap analysis, why do you have a need? What is your opportunity? And what threat is pushing you there? What happens if you don't accomplish it? We have those two pieces.

That being said, this is often where, in a real world scenario, or in terms of occupational health and safety management systems, people can get quickly deterred and overwhelmed, because now I know I want to get there, I really want this dinner, I've bought in, and I want to avoid missing out on that, but there's a lot of details that we just started brainstorming that are potential barriers. And so this is where we really do have to kick off that plan stage that I had mentioned earlier is so important to really spend some time on, because we're going to be able to move through that systematically, and take it one step at a time, rather than trying to think of all those risks, and, "Could we do this? And could we do that?" And pulling all these different pieces, let's think about it one thing at a time.

**Ken Rayner**

Now if we've got a list of 17 things, where do you start? Which one do you start with first?

**Maren Gamble**

So I like to approach it using a "who, what, where, when, and how" kind of framework. Asking ourselves these questions, we can sort of drill it down to things that we are able to answer. Those of you who were counting my questions there noticed I left out the why, that's because we just determined the

why. That was our pre-planning. Why? We want to go to dinner. But we still need to answer the rest of the questions, and that's really going to form our plan. If I were to look at our boating scenario here and ask you who. Ken, who is possibly involved in this trip that we need to take?

**Ken Rayner**

Okay, so it's your birthday did we say? We're going to go celebrate your birthday?

**Maren Gamble**

I mean, definitely.

**Ken Rayner**

Sure. Okay, so maybe your significant other, my significant other, the four of us.

**Maren Gamble**

There you go. Yeah, sounds good.

**Ken Rayner**

Okay, those are the people that are going to be involved.

**Maren Gamble**

Okay. So we're going to travel, that'll be the four of us going. Other people we might need to think about though, if we sort of think a little bit broader. We're the ones going, but is there anyone else we need to rely on?

**Ken Rayner**

Well, you don't have a boat, I don't have a boat, so you determine we need to rent one, so we're going to need to engage with somebody who has a boat, and then get their help with making sure that I guess it's lake-worthy, and it's going to get us across. So we'll definitely have to engage with them.

**Maren Gamble**

That's right. So us, the rental company.

**Ken Rayner**

Maybe we want to let the restaurant know that we're coming-

**Maren Gamble**

The restaurant.

**Ken Rayner**



...Just in the event that we're supposed to show up for our 5:00 dinner reservation, and we don't make it across the lake. Maybe the restaurant is going to do something and in the event that they know that we're not there and that we were expected, maybe.

### **Maren Gamble**

That's good. I think those are some of the key influences in terms of what we're talking about. If we keep thinking about potential influences, we could extend to maybe other boaters who might be influenced by us as we move across this lake, and maybe even if there's any emergency response things that are being set up by that rental facility involving shore-based communication, or coast guards, or who knows? In terms of that. So there may be some other parties that are brought in as we go through and identify other pieces.

### **Ken Rayner**

Okay. And let's throw one more up there. It's possible that we can get this from the rental company, but just some navigation of the lake. I mean, most cases, it could be a straight shot across and we don't have to worry about the depth of the lake, or any rocks, or obstacles, or hazards, but in some cases, we know that there's buoys out there, what do those buoys mean? Do you go to the left of the buoy, the right of the buoy? Are we clear about that? So perhaps we need just to make sure that we're clear on nautical processes, and the lake itself. Is there anything about the lake that if we've never ridden a boat on it or have no familiarity, is there any concerns about the lake itself? Because some lakes are different, I mean, my gosh, you'd never want to take a boat across Lake Superior. I know that's the extreme, but it's very different, and I think depending on the lake, there are different... You have different conditions depending on the lake, and the day.

### **Maren Gamble**

Perfect. So if we were to frame that in terms of the who question, who might we need to involve? It might be the rental facility that would be able to give us that information. There might be another resource that we need to tackle in terms of finding out some of that information. Whether it be speaking to a local, or maybe there's some documentation, maybe we even need someone to captain our boat, but there's probably another conversation around that.

But I think you brought up one perfect example there, Ken, in terms of something we can do while we're practicing, is, there's a lot of things that will come to mind as we go through, and so in order to continue sort of moving systematically through, make sure we're always answering the question we asked, because otherwise, we can branch out all over. Those other ideas will have a place, and we need to keep them off in the margin, or we need to tie them into the question we asked. But in order to sort of systematically build our plan, we want to make sure that things are kind of flowing into our questions that we're asking.

### **Ken Rayner**

Fair enough. Does that sometimes happen, which makes, as you said, the plan phase that much more challenging to navigate, because you keep adding things, you keep adding things, and then all of a sudden, as that old adage goes, you're trying to boil the ocean, which is an impossible task, right?

**Maren Gamble**

That's exactly it.

**Ken Rayner**

Because you've added so many elements to this that it's going to be so difficult of a task to get it off the ground. Let's make sure that it's streamlined, that everything we're talking about is in scope. So please feel free to chastise me if I get off scope in this case, because causing us to not successfully execute our plan. So go ahead and just tell me, "Ken, stay on point, this is the question I asked you. Give me the answer."

**Maren Gamble**

No, because I think that's exactly what this practice is about. We're navigating, forgive the pun on that one, the plan, do, check, act-

**Ken Rayner**

There you go.

**Maren Gamble**

...Process here, and practicing it, really, for the first time, or one of the first times, right?

**Ken Rayner**

Right on.

**Maren Gamble**

So now that I have my list of who, what I like to do from there is pick one of them. Pick one of those parties from that list, and ask the rest of the questions about that person in this example. So I'm going to say the rental facility, because there's a fairly defined thing for us to talk about there in terms of their scope for this. If we were to look at the rental facility, and say with that rental facility, "What are they doing? When are their actions happening? Where are their actions happening? And how do they need to complete those actions?" We can start to fill in that framework of, this is who we've identified, and here's what I need them to accomplish in terms of our plan. So let's try it, Ken.

**Ken Rayner**

Yeah, let's do it. And then again, feel free to chastise me if I get off point.

**Maren Gamble**

I'll jump in if you're off, but this is all valuable.

**Ken Rayner**

All right. Okay, here we go. So we're going to talk about the rental company, and go ahead, Maren, what's the first question we want to flush out here with the rental company?

**Maren Gamble**

So at this point, I usually try and think about what's the easiest for me to answer. So you can do these in a little bit of a different order. When it comes to the rental facility, I'm going to say the "where" is fairly straightforward for us to consider, because to my mind, the rental facility is going to have a pickup point, a drop-off point, potentially some offices where they do the administrative things, but a limited number of facilities that we can identify with that rental company pretty quickly.

**Ken Rayner**

Maybe a website.

**Maren Gamble**

Maybe a website.

**Ken Rayner**

The location, their hours of operation, and different things in terms of information that's easy to access.

**Maren Gamble**

Excellent. And you just sort of slid into another question, which is the when. With that rental company, what are their hours of operation? We need to make sure that they're actually open when we need...

**Ken Rayner**

That would be tragic. Your birthday's on a Sunday, and we call on Sunday and the rental company says "Oh, I'm sorry, we're closed on Sundays." Oh, we didn't plan that through.

**Maren Gamble**

That would be very disappointing.

**Ken Rayner**

Yes, that would be.

**Maren Gamble**

Can we get the boat as early as we need it? Can we keep it as late as we need it? The other thing I'd say is, we can expect that the rental agency is going to have paperwork for us to fill out in advance, potentially screening and licensing that we need to provide. They might do some training for us in terms of some of these needs that we need. So we're going to have to find out as well, from that rental company, when do we need to arrive in order to leave when we want to leave from the dock. So there's

a lot of time considerations that the more you sort of think about it, the more it's going to come into play with just the rental facility alone in terms of their requirements.

**Ken Rayner**

Yeah, yeah, I know there's somebody listening, and kind of goes, "Do we really have to go to all those extremes?" And I would say, for each time you've got a person standing there on the dock shaking their head because they didn't plan it out properly, yes, because in each of these instances, I can see somebody not thinking ahead, not considering, is the place open on a Sunday? What is the process when we get there? Maybe we're arriving on the Sunday of a long weekend, and they're packed, and all of a sudden, we've got 20 people in front of us, and it's going to take them a couple minutes to process each person, and we're now 40 minutes in line, and we didn't plan for that at all. And now we're feeling anxious, stressed out, upset, but it really was because we didn't plan it.

**Maren Gamble**

That's right.

**Ken Rayner**

Had nothing to do with anything else.

**Maren Gamble**

Now, do I expect in real life that everyone is doing it this formally when they go on a boat trip? Maybe not.

**Ken Rayner**

No.

**Maren Gamble**

But you could see the advantage to if you do. The other thing about that is, it's tough for us this first time when we're gathering all this information, but if this is a location that we visit every weekend, all summer, you come up with this plan that includes all the different contingency, all the different information, and as you've moved through this cycle, the next time we want to plan, we already have gathered a lot of that, and we can repurpose it, which is why it's beautiful that it is an iterative process, that it does cycle, is because it will help us in the future once we go through it the one time.

**Ken Rayner**

Okay, Maren, that was fantastic. I'm interested to hear what were you going to ask me about the what and the how now?

**Maren Gamble**

The what and how.

**Ken Rayner**

So what are we going to ask about the wrenches in the “what” and the “how”?

**Maren Gamble**

So I targeted the when and the where, because they felt easier for me to get out of the way, they felt like simple answers. The what and the how can... I don't really know what a rental company needs to do, or how they're going to do it, and I imagine they all do it slightly differently. So we ask them. That's how we answer the what and how, we need to ask them. So part of the planning process is accessing information from various different parties. So you and I aren't going to be able to complete this whole plan ourselves without making some phone calls, without getting on the internet, checking out some websites, and talking to people.

So if we talk to the rental company, odds are they're going to want to verify our boating license, our experience, our knowledge of the local waterways. You brought that up. They're going to want to know that we have acquired that information already. They're also going to want to make sure that we're physically able to operate the boat that we are choosing to rent. There's lots of different boats out there, and they're going to want to make sure that we are physically able to handle that operation. They're also going to want to train us on emergencies, breakdowns, fuel problems, injuries, if we get a person overboard, let's hope not. But let's say it happens, they're going to have a lot of information for us in terms of how to operate their vehicle, and how to treat it well. The reality is, only they know that, and they've already planned all that in their own PDCA. So the best source for that information rather than guessing is to just ask them.

**Ken Rayner**

Okay. And might even include, if we wanted to just feel good and feel confident, that we're taking out a lake-worthy boat, is, when's the last time the boat and the motor were inspected? Were there any defects during the inspection that we need to be wary of, or need to just be... So that we're aware?

**Maren Gamble**

I would want to know that. Yeah. Behind the scenes that is something, that is what that they need to do. And we can ask how they do it, how do they keep record of that? Is there a way that they communicate that? And we can ask those questions in terms of the what and the how.

**Ken Rayner**

Of all the years, because I take it the rental place, let's say it's been around for a few years, and so is the restaurant, and I would guess if the restaurant is only accessible by boat, then probably this rental place has had a few restaurant goers decide to rent a boat from them and go across the lake. Maybe it's a case of, is there anything that you've learned from other people taking out the boats and going to the restaurant and back that we need to be aware of?

**Maren Gamble**

Beautiful. Learning from someone else's PDCA, Ken. They've already done this process, so we can borrow their information and their learning, and I think that's a perfect contribution to this. So we need to do our research as part of making our plan, figure out what the requirements are.

**Ken Rayner**

Maren, you're such a great teacher, look at me contributing to this, and all of a... You're getting me into the planning stage, and thinking of all these things. Look at you, here we go. Feeling good about our boat ride.

**Maren Gamble**

But I will point out, Ken, that we do have a long way to go in terms of the plan. It feels very manageable though, doesn't it? We've just looked at one of our who answers, the rental facility. And we did it systematically, so we feel confident that we've sort of brainstormed around that. We still do have a whole group of other people that we would want to repeat that process for. So I said practice. Bear with me. How about we look quickly at one other who. Another simple one, which would be the restaurant.

**Ken Rayner**

So I would love to do that. And I'll tell you, for me, Maren, in the industries that we support, that in many cases, they're conducting high-risk activity, and I can imagine that it can be stressful if it's not planned out. Because we're looking to take a boat trip, and I'm a strong swimmer, however, anytime you're going to venture out into open water, you need to be smart. And I can tell you, quite honestly, as we've been recording this podcast, there's part of me that just feels more confident in what we're going to be doing. Honestly, it does. And I know it's fictional, and we're just making this up, but there's part of me that goes, "I feel way more prepared to take this trip now." Because we've got about 50 check marks that we've gone, "Hey, we've already investigated into this, so if this goes wrong, we've already kind of given it some thought, and we know what we're going to do." Or we've said, "Hey, this can be a risk." And now we're clear as to what that risk is, or how we're going to avert that risk, right?

**Maren Gamble**

Oh, that comment just gives me chills, Ken, because that's the whole point. When you have a system, when you've built it and you have that information, you can build confidence in the people who need to perform whatever the task is. And that's how you get buy-in, that's how you build positive safety culture in your organization. And we get so many questions about how you develop those more abstract pieces of an occupational health and safety management system, and that's it right there, is when you can feel the system working for you, and it makes sense in your organization and in your context. It makes you feel better about what you're doing.

**Ken Rayner**

So let's talk about the restaurant then, because feeling so good, I want to keep feeling more-

**Maren Gamble**

Okay, let's do it.

**Ken Rayner**

...Comfortable and confident. So let's go.

**Maren Gamble**

Okay, so we're going to do this like a speed round, Ken.

**Ken Rayner**

Okay.

**Maren Gamble**

We'll see if we can do this. So for the restaurant, what are we looking to get from them?

**Ken Rayner**

Their hours of operation. We'd hate to go over there and arrive and do all this work and they're closed.

**Maren Gamble**

So pause for a sec.

**Ken Rayner**

But just to... Yeah?

**Maren Gamble**

Physically, what? What is the outcome we're looking to get?

**Ken Rayner**

Oh. Oh, sorry. So physically we are looking to have an incredible experience through delicious food, a fish fry, an incredible view. You mentioned that they've got some of the friendliest and the nicest staff anywhere in the north, all those type of things, we want to experience.

**Maren Gamble**

That's right. So what from them is we're going to get all that stuff. When are we going to get it?

**Ken Rayner**

We're going to get it the day of the experience, so maybe we need to... All right, so I'm hoping that I'm going down this road with you, but let's go down. Let's say, if we've eaten there before, and we've got someone who's served us before, and we know they're extremely friendly, we've had a great experience with them, could we request them if they're working that day, in terms of, "Hey, we had Brian before,

he was so friendly and attentive, and we had so much fun with him, he has a great sense of humor, could we have Brian as our server again?"

**Maren Gamble**

Yeah, I love Brian. We should definitely go-

**Ken Rayner**

Love Brian.

**Maren Gamble**

...When he's on shift. Yep.

**Ken Rayner**

Okay, we're going to go when Brian's on shift. And what about the table that we're going to be sitting at?

**Maren Gamble**

Yeah.

**Ken Rayner**

Number one, we wanted to make sure it's comfortable for us, but also you also mentioned a view.

**Maren Gamble**

Yes.

**Ken Rayner**

If we're going to take some risks here and go across a lake for a reward, then let's make sure that we're getting the full reward.

**Maren Gamble**

That's right. Maybe we want to catch sunset, we better figure out when sunset is and be there at that time, if that's what we want to see.

**Ken Rayner**

Good point. Because sunset in the end of August is different than the sunset at the end of June.

**Maren Gamble**



That's right. When we're looking up on our weather app to see if there's any storms coming, we can also check that. We should definitely check that weather app for the when as well. Is there a time of day that's going to be bad news for crossing a lake? Because that's something we'll want to know as well.

**Ken Rayner**

Is our favourite chef working that night?

**Maren Gamble**

Oh my goodness.

**Ken Rayner**

Maybe Chef Enzo is our favourite chef, and the way he prepares the rock bass is just nothing like we've ever tasted before. So Chef Enzo is working.

**Maren Gamble**

Exactly.

**Ken Rayner**

Is he going to be working that night? And if he is, then that's another aspect of the plan that's going to contribute to our overall experience, right?

**Maren Gamble**

So exactly when we engage with the restaurant for this is going to be determined by all those factors. So again, we will have to do some research, calling the restaurant. Again, we want to make sure they're open. I mean, probably if Brian and Enzo are both working, they're at least open, but we want to check all those factors. So, what? We're going to get dinner. When? We have to answer some questions to make sure all of our criteria are met. Where?

**Ken Rayner**

The where piece, what do you mean by where? Are we-

**Maren Gamble**

Simple, in this case: where is the restaurant? Where are they performing their part of this plan?

**Ken Rayner**

It's being performed at the restaurant.

**Maren Gamble**

Exactly. It was too simple an answer, right?

**Ken Rayner**

Oh, boy. Yeah.

**Maren Gamble**

So the where on this one is that island that's only serviceable by boat. They only have one location, so their "where" is limited to that facility. And then, how?. "How?" is often the biggest question, how do they accomplish all those things? So once we figure out the what, when, and where, we have to ask ourselves "how?" And how is what turns into process. So this is where we'd be able to talk to the restaurant and understand how all those different pieces come together. Again, we're doing our research. Ken, there's so many questions we want to ask if we've never been there before, how does docking work? Are there docking fees? Is it cash only? Is there a dress code? Can you have dietary accommodations, if that's what we need? There's so many questions we would want to ask the restaurant, but it's up to the restaurant to talk to us about how they're going to be able to deliver on all of those things.

**Ken Rayner**

We're going to a lot of trouble to plan this out, right?

**Maren Gamble**

Yes.

**Ken Rayner**

And we're asking a lot of questions, and we're engaging with a bunch of different people, but there is risk involved, right?

**Maren Gamble**

Yeah.

**Ken Rayner**

So when we're planning, do we want to correlate the amount of effort and time we put into the planning? Does that correlate to the risk of the activity? If it has significant risk, should the planning be that much more comprehensive, compared to some activities where we know the risk is extremely low, and the planning may not be that... It can be fairly straightforward and simple?

**Maren Gamble**

Ken, have you done this before?

**Ken Rayner**

Not with you.

**Maren Gamble**

I mean, definitely. The more severe, the higher the probability, the higher the frequency of exposure to those risks, it makes them high priority. It's the definition of a critical task, it's the definition of high priority, and that is certainly where we would want to focus our most energy in terms of plan, do, check, and act, as well as our first energy. You cannot do everything at once. Just to all of the budding occupational health and safety management systems developers out there, you cannot do it all at once. It has to be worked through one step at a time. Attempting to do it all at once will, again, overwhelm you. So target those high priority items to make sure that you're getting those out of the way first.

**Ken Rayner**

Yep. And I can completely appreciate how, if we have a member of ours that's going to be performing trenching, or we have someone that's going to be working with high voltage electricity, or someone that is going to be embarking on a 500-kilometer trip hauling cargo, planning is necessary, because if you don't plan out what you're doing, I guess you're then leaving it up to chance to a great degree, regardless of how many times you've done it before.

**Maren Gamble**

Yeah, I mean, we talked about the threat versus the opportunity. In the case of our example, the opportunity is something we want, the threat would be a disappointment. But when you're talking about high risk work, like done in our industries, the threat is so significant if we don't go through the PDCA, if we don't move from the threat to the opportunity. The opportunity is completing the work safely with healthy workers that can return home at the end of the day, and that's what we really have our eye on.

**Ken Rayner**

Absolutely. Okay. We've covered a lot in plan and pre-plan. Is there anything else you want to cover in regards to this segment?

**Maren Gamble**

Really, I just wanted to highlight that we've gone through this, and right at the beginning, we started brainstorming all these different pieces that we'd have to think about. But when we started applying a framework associated with the concept here to what we were doing, we went through and we already built out a lot of information around the restaurant, the rental facility. We could go through and do that for the rest of the people on our list, and once we had all those different pieces together, we really have the ABCs of our plan. We have the building blocks that we can put together. We'd be able to look at all of that information that we've now gathered, and actually work it into something that falls a bit more chronological. So it'll be a giant collection of information by the time we do the brainstorming.

Our next step to really formalize it into a plan is going to be to take it and say, "Okay, what do we have to do ahead of time?" A week ahead of time, a day ahead of time, the day of, and sort of break it down by that, as well as sort of group those responsibilities for each person. I'm not going to do all the planning myself, Ken, so some of it's got to be your responsibility, and we've got to really put it into

something that's user-friendly, because we just went through this effort, and now we want other people to benefit from the work we've done by being able to access it.

**Ken Rayner**

Absolutely. Okay. So Maren, I feel very comfortable on taking a boat ride with you in terms of going over with and having my loved one come in the boat with you and your loved one, and us crossing this lake to this restaurant and coming back on the lake. I'm feeling very comfortable that we are going to be able to navigate the water safely, have a phenomenal experience, and come back safely so that we can go home. I'm confident in that.

Now, on our next episode of the *IHSA Safety Podcast*, we're going to continue this discussion on plan, do, check, act, and we're going to get into the do phase. So this is when we implement our plan. All the things we just talked about, now we're going to implement it. So I guess, Maren, on our next episode, we're going for a boat ride. Would that be right?

**Maren Gamble**

We're going for a boat ride. Yeah.

**Ken Rayner**

We're going for a boat ride. Okay, Maren, thank you so much for all the information on the pre-planning and the planning stage of PDCA, and join us next time for a boat ride, right?

**Maren Gamble**

Thanks, Ken.

**Ken Rayner**

All right. Thank you. And thanks to the listeners for listening to the *IHSA Safety Podcast*. Be sure to "like" us, and subscribe on your podcast channel. Thanks so much. And visit us at [ihsa.ca](http://ihsa.ca) for a wealth of health and safety resources and information.

**Announcer**

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