



Ken Rayner

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 joining me on this second part of this podcast is our good friend Maren Gamble. Welcome back, Maren.

Maren Gamble:

Thanks, Ken. Thanks for having me again.

Ken Rayner:

Yep. And so, for anybody that's just started listening to this podcast, Maren and I are going to recommend that if you haven't listened to the first part of this particular podcast on the plan-do-check-act (PDCA) model, go back and please listen to it, because it's not going to make as much sense if you're starting with this one. So, please go back and listen to the first one. And Maren has put together a bit of a boat ride for Maren's birthday plan in a document that we are going to post on the podcast channel. And if somebody is listening to it now and may want to pause this podcast, go find that document and take a look at it, that might work as well. Is that fair, Maren?

Maren Gamble:

Yeah, that would make a lot of sense. Yeah. The document that I made, it's taking our simple little example and applying it to an ultra-formal template in terms of what a plan for this boat ride would look like. So, it is a little bit silly in that sense, but that's really just to highlight where we ended up at the end of our last podcast after all of our good conversation.

Ken Rayner:

Yep. At the end of that last podcast, Maren, I can remember very distinctly feeling very comfortable. Even though it was a fictional boat ride that we were talking about, I still had a belief that if we were going to embark on a boat ride across open water, that we were prepared and that we were going to avert the risks and make sure that as we get across the lake, that we can do everything that was in our plan. All the objectives we had, we were going to be able to accomplish all of them and arrive back safe and sound to our home. And your plan gave me that confidence. So, just goes to illustrate the importance of the plan, and we got into a lot of the nuts and bolts in the weeds in the last plan. Maren, I don't think we need to get into that much detail in the do, check, and act...

Maren Gamble:

That's right.

Ken Rayner:

...Segments. Is that fair?

Maren Gamble:

Yeah, that's totally fair. The plan is where you really do get into all those details and you let your mind kind of branch out to every possibility under the sun. And that's why using this sort of systematic process is important, so that you make sure you do cover everything. But then, just like we did at the end of our last podcast, we stepped away for a minute and we're coming back to this at another time. That's what I recommend anyone do, when you have that first brainstorming session and you work through all those different pieces, that you then step away from all that information for a while. You make sure you have it written down, and the next day or a couple days later at least, you sit down and you look at it with a bit of a fresh mind, and you look at how it can be put together into something meaningful.

And that's what I've attempted to do as an example for anyone listening in that document. The other thing I wanted to mention too is, when we started doing it, we talked about the restaurant as an example of a “who”, and we worked through it. We talked about the boat rental facility and we worked through it. We started with who in that example, because that's kind of where I felt most comfortable going for this. But you could start with anything as your starting point. If it's a task, you might want to start with what you're doing. If it's a change or change management aspect, you might want to start with the “when”—when is this happening? So, there's no rigid structure to how you do that plan. Basically, you let your mind wander, and then at the end, you pull it back together into a standard template, which is what we have.

Ken Rayner:

All right. So, are we ready to do the “do”?

Maren Gamble:

Absolutely. I am more than ready for this boat ride, Ken.

Ken Rayner:

All right. Well, let's do it. What's the first thing that you suggest we do here?

Maren Gamble:

We carry out the steps.

Ken Rayner:

All right.

Maren Gamble:

So, most simply, the do phase is following through on exactly what you plan during your plan step. That's why it was important for us to do all that detailed work when we were talking about our plan, because now we have a plan that covers hopefully all the contingencies, at least the vast majority of the contingencies. Our plan, at this point—we may have to look at assigning actual people to the role. So, when you're writing a general plan, you might write roles in there in terms of general things. So, in my example, I wrote event planner and facility and guest and restaurant. Well, in real life, those are real people.

So, one of the things you do need to do when you're doing the do is assign actual people to the roles and make sure that everyone's aware of what role or roles they fit in, because you really can fulfill more than one role at the same time. So, honestly, what are we doing in this, Ken? We're getting a boat, we're taking our guests, we're crossing a lake, we're going to a restaurant, we're having an amazing dinner. I think it's my birthday, so we might have some candles to blow out and enjoying the evening. And in this case, that's the heart of the do.

Ken Rayner:

Okay. Now, Maren, if everything goes exactly to plan in the do phase, that's great. What happens if something goes awry? We're doing the do, and something that either we haven't planned for or that we planned for happens, and it's taking us sort of off course. What is it that we're looking to? What do we need to do then, in the event that something goes awry?

Maren Gamble:

Yeah, because as it turns out, not all plans go perfectly every time, so that is an important thing to be prepared for. Really, in the do step, one of the things that you're focusing on is also collecting data. So. This would be something that we would be collecting data around. So if something goes wrong, we're going to make a note of it. We flag it, and we do a quick assessment-and-control process. So, how big is the risk, is this a risk to us, and what can we do to control that? So, there is an ongoing hazard assessment process that would be a part of your plan, and exactly how you want to, one, deal with that and to record that, should also be figured out in your plan ahead of time, so that you really are still following your plan for unplanned occurrences.

Ken Rayner:

Okay. So, we go. Again we go across the lake, we have an amazing celebration, it's everything we were hoping for. The plan has pretty much happened the way we were expecting. And so, the evening comes to a conclusion, Maren, but I take it there's going to be, the word check now comes into play, so we're going to look back at the evening and sort of determine what went right, what could be an opportunity to improve if we ever want to do it again. At what point do you want to do that? Do you want to do it while it's still very fresh in your mind?

Maren Gamble:

So, we know that the check is coming, as you said it. And to that end, part of the plan as well was looking at what kind of records do we need to keep? What kind of things do we need to be observing throughout? So really, there's pieces in that plan that we'd make a note of, that we're going to do a hazard assessment the day of. Let's keep a record of that, that we need training, we need licensing, we might have confirmation of our reservation at the restaurant. We can keep records of all of those things. This plan that I put together includes a checklist for the day so that we can make sure we're doing all these things. So, we keep that checklist and we make sure that it was completed along the way.

So that if there's any records that are spelled out in our plan that we were supposed to be keeping, accomplishing, updating, then we're going to be collecting those throughout the do-step so that we're ready for that check-step. Part of our plan as well includes that debrief, because exactly like you said, Ken, while it's fresh in our mind, we get back to the cottage, let's have a fireside chat. Let's talk with our guests and figure out, was it a good event? Did they enjoy it? Were there things that could have gone smoother? Were there things that they would add in next time? And debrief and collect that feedback as part of our do step, but part of our do step that is directly looking at what we're going to need for the check, because that check, that's when we look at whether things worked.

Ken Rayner:

Okay. Can we maybe give an example of something that, as we're going across and taking the boat across the lake, tying it up over there, bringing it back, what are some things that we should be considering from a check perspective, Maren, that would be important?

Maren Gamble:

Sure. I mean that we're going to look at all the records that we collected. So, the hazard assessment. You mentioned, what if something that unexpected comes up? So maybe mid-travel, we were accosted by a wayward seagull that we hadn't accounted for in our hazard assessment to begin the day. So, have we recorded that occurrence and made note of the impact of wildlife on our journey for the day? Was there a piece of ID that the rental facility asked for? Did we have all those? Did we not have all those? Maybe we quiz our guests at the end of the day, and I don't necessarily recommend you do this in your personal life. But as an example, you quiz your guests at the end of the day. Do they know what the emergency response requirements would be, should something have happened?

Really, we're looking at all of those records that are spelled out in our plan, which include our checklist, our inspections if we did a circle check, our training, our feedback from everybody from our debrief, which we should record, and any hazard assessments and updates that we have. So, we'd have all those pieces collected. They're ready for us throughout the "do" because we planned for them. But in the check, we're going to sit down and look at them. We're going to ask ourselves questions like, "Are these things complete? Was anything missing from these things that we should have had there as part of our plan? Did we get any surprise hazards? Did we have all our training? Did we actually see the sunset?

I think when we were planning, we had wanted to see the sunset, so did we manage to do that? Was the food good? Was our favourite server working? Did we manage to hit all those checks that we wanted? What came up in the debrief? Was there something that our guests would've liked to see that wasn't there? In my plan, I talked about who should have copies of our documentation so that we were ready. Did those people actually get those copies? And asking all these questions based on the information in

front of us to say, where did things go really well and where did things maybe have opportunity for improvement?

Ken Rayner:

Yeah, that's terrific, Maren. That was a great list, and it really is the difference, is it not, between condition expected, right? So, we write up a plan and we have a condition that we're expecting to either be in place or it's going to happen or something along, but we have an expectation. And then, when we actually get to that point, what was it in reality, right? So, what was the condition as we found it or as we came into it in that time, and did it match up against our plan? And then if it didn't...

Maren Gamble:

That's right.

Ken Rayner:

... Then why not?

Maren Gamble:

And so, the outcome of the check, the check step, rather, in that sense, is that difference between our expectation and the reality. We're just identifying what those differences were. The neat thing about that is they can be positive or negative. The difference might be that something fell short of our expectation. Our favorite server called in sick and we didn't get to see them that night. Something fell short. It could also be that something exceeded our expectation. Maybe this restaurant has added live music since the last time we were there and that was something that we enjoyed while we were there. And so we're identifying things that are different from expectations in a positive way, in a negative way, or even just meeting expectations. That's also valuable information for building your system.

Ken Rayner:

Absolutely. Now, Maren, is it possible, and I'm just asking you to make a guess on this, but would you say that if there's an organization that is doing the planning and then performing the work and the work, goes really, really well, everything goes well—is it possible that they almost feel they could skip the check phase? Is it one where, the plan phase for us, when you compare the amount of time we spent on the first podcast compared to how much we're going to spend on this one, which is do, check, and act, compared to pre-planning and planning. Obviously a lot more time spent on the planning.

The check phase seems to be one where it's probably one of the quicker things to do, however, it may also be one of the ones that people don't spend enough time on and don't get the full benefit from it, in terms of just really going, what worked and what didn't, because this is the only time we're going to perform the work and we'll have a chance to evaluate before we do the work again. So, what did we learn?

Maren Gamble:

So, the check step, it's a very good question, Ken, because this check step is one that can be tempting to speed through, because it feels like you're done. You're done what you were aiming to do, it's over. It's tempting to sort of go through it as a pencil-whipping exercise or kind of just move through it very quickly. The thing we've realized though is that it's actually critical that it be done well, in order for your system to really benefit from that continual improvement, that efficiency, and that effectiveness that you're looking for in a system. If all we do is plan and do and sort of look for successes and not really do the check, then we're really short-changing ourselves in terms of what a system is really intended to do. So, the check stage, it's quick in the sense that you've already planned out what you need, so you have a full list of items that you're going to be looking at. You don't have to go down all those rabbit holes, but it is an important one to really take the time to sort of stop running, if you will.

If we're looking at occupational health and safety management systems, sort-of coordinators and experts out there, we often feel like we're running all the time from one thing to the next. And when it comes to this check stage, it's important to stop running, and take a breath, and really look at what those things are, because the thing that then does get sort of skipped, if you will, is often the act. So, if we're not looking and finding things to acknowledge that are positives and negatives, it's tempting to skip from the act right back to the plan, and say “no changes necessary” and “just keep doing it the same way in the future”.

Whereas, really, the act stage is really this critical piece where anything you found—successes, gaps, or even things that just met expectations—should be acknowledged in some way. That part can surprise people. I was just looking for gaps and fixing them if there were problems. But it's important that we also acknowledge the successes in the act phase. If I think about our trip here to the restaurant, if we had a really great time and everything went smoothly and fabulously, the actions from that, when we look at the check stage and the records that we collected, we're going to plan to do it again. Maybe we'll book a date in the calendar. That's a success. We might leave a positive review for the restaurant, for the boat-rental facility to acknowledge the successes that they had there.

If there's anything that we would do differently, we have the opportunity to make those changes. We have the opportunity to make those changes right in our plan, if it's something that we can plan for ahead of time, and we can really just sort of acknowledge everything that happened in that trip. If things went sideways, Ken, we could decide we're not going back there, or we could start from scratch. Maybe we need a different rental facility. Maybe it's a different restaurant. Maybe there's something that really does send us back to the drawing board. But in most cases, we're identifying more minor corrections to move back through this process.

Ken Rayner:

Yeah. But I'm envisioning as you were going through this, us being a general contractor, as an example, and finishing up a project or finishing up a very complex task, and going around to all of the subtrades and sharing with them how well the job went and why it went well and recognizing the contributions that they made. In the same way...

Maren Gamble:

Yeah.

Ken Rayner:

...You'd believe that those, just like if we did it at the restaurant and because we had a plan, we didn't put any more stress and anxiety on the boat rental place because we weren't late, and we had all of our information and we knew what we were doing. I'm going to guess that boat-rental place is going to go, "You know, Maren and Ken are great customers. I'd love to have them back again." Right? Same thing over at the restaurant. Because we went through and did those things, the outcome with the others that are associated with the plan is going to be that much better, and they're probably going to want to contribute to the next plan and be a part of the next plan because there is a plan. There's not just, "Go do the work."

Maren Gamble:

Absolutely.

Ken Rayner:

Right? And then you're checking afterwards, to go, "Hey, how did that plan work for you?" And then, "Let's improve upon that plan," because regardless of whatever is done, there's always going to be an opportunity to do it better, right?

Maren Gamble:

Always.

Ken Rayner:

Always.

Maren Gamble:

Yeah.

Ken Rayner:

Always. We've never said "Once you become COR® certified, you have a perfect system." It's never been said once, "You get certified to ISO45001, it's a perfect system." It's continual improvement, right?

Maren Gamble:

Exactly.

Ken Rayner:

Yeah.

Maren Gamble:

That's what the system is absolutely about, Ken, and you hit on something really critical there too, in terms of this. That we can go through the PDCA, and certainly, we're focusing on achieving the thing, the goal, the opportunity that we talked about in the last podcast. And this will help us do that effectively and efficiently. But when you have this sort of system working well for you or this sort of concept around systems working well for you, this PDCA, it actually has that kind of side benefit impact on the relationships of those people involved. So, in this case, you talked about the rental facility, the restaurant, and how it makes them want to work with us. It probably made for a better evening for our guests as well if we weren't stressed about figuring all these things out.

It works like that in the real world too. If we were a general contractor. All of a sudden, when you have these kinds of systems that are working well that have the full loop, that aren't just plan-do, but they are plan-do-check-act, and they're feeding into themselves, you see that the relationships with your own staff, internally, with your subcontractors if you've got them, with owners, with everyone out there who's trying to engage with this process of your service, is benefiting from that relationship, from feeling comfortable, from feeling safe with you, from understanding what's happening.

Ken Rayner:

Yep. So, the communication piece of the act segment, I take it, is one of the most critical. Because if everything went well, then you may still have an opportunity to improve something, however, by communicating to all involved how much you appreciated their contributions and how everybody contributed to the ultimate success. And if things don't go well, then you look at it as an opportunity to make it better the next time.

Maren Gamble:

That's right. And I think we focused in on this a bit, but just to reiterate, the key is to not just look for catastrophic failures in that sense, right? Not just a boat collision or the restaurant being closed, but to really look for wins for more minor changes. For anything that doesn't jump out and scream, "You need to look at me," but to proactively take that look and celebrate if there's something worth celebrating. Nothing says that a person is valued by an employer and in a workplace more than being recognized for the successes rather than just all the talk of delays this and problems there, right? So, celebrating those successes is a major value-add of this concept.

Ken Rayner:

Maren, we spent the better part of, oh wow, over an hour, talking about, based on these, both of them together, PDCA. Is there anything that you'd like to add here? Maybe we have an employer or supervisor that's listening to this podcast, and they haven't delved into starting to create their own program or their own system. Anything else that you'd like to give as a guidance in terms of where they start, or just taking their first crack at PDCA and starting to utilize the methodology that you've shared with us?

Maren Gamble:

Absolutely, Ken. I think that's a great point. I think we have to acknowledge that, in these podcasts, we've done something very formally for something that you wouldn't normally do so formally. I

wouldn't tell anyone listening that they should go out and start applying these detailed procedures for their everyday life. That might start to drive your family members up the wall a little bit. But the same thing can be done and should be done in the workplace context, and you can look at more and less complex aspects of what you're doing. So, could we look at computer work? Sure. Can we look at driving? Yeah. Communication? Definitely.

What I would suggest for anyone listening is, what's your thing? What are you the expert in? Start with that. Start with what you know, what you know best, and work through that, and think about developing this for something that you're comfortable with the ins and outs of so that you're not going down a lot of uncertain paths. You have your footing on this journey. And yeah, you might end up going down a bunch of different places, kind of like we did Ken, when we were talking about the boat ride. We identified all kinds of stuff, just things popping into our mind as we went, but we were doing it on a topic we had some basic knowledge about and that helped us get to the conclusion in the end. So, that's what I would suggest for people to do is start where you know.

Ken Rayner:

Start with something you feel very comfortable with and then build upon that.

Maren Gamble:

Yeah.

Ken Rayner:

That's a great suggestion because the things that you know about, you've got more understanding as to maybe who you should ask or who else you need to bring into the conversation, and then build it from there. That's a great tip. Thank you very much, Maren.

Maren Gamble:

And you bring up a good point about who else you need to bring into the conversation. I recommend never doing one of these solo. You might start it solo, but always having some other experts in there to bring you an alternate perspective. And if you are struggling and you are a newer person to doing this, feel free to reach out to us at the IHSA as well, because, hey, that's what we're here for, to help you accomplish those steps and to learn to do these things.

Ken Rayner:

Great advice. Maren Gamble, IHSA's Manager of Strategic Programs, thank you so much for being with us on this two-part podcast, talking about plan-do-check-act method, and making it, I think, hopefully as easy to comprehend and to implement for our members that haven't been through it before as we possibly could have made it. So, thank you again for having some fun with me and us coming up with a fictional boat ride. Maybe someday we'll actually get a chance to go for a boat ride together with our significant others and celebrate your birthday. And if we do Maren, I know we'll be well planned to make that happen, for sure.

Maren Gamble:

I'll at least feel safe.

Ken Rayner:

Oh, absolutely. One hundred per cent. Yep. Thank you very much, Maren, for being with us. Great job.

Maren Gamble:

Thank you, Ken.

Ken Rayner:

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