Procedure Checklist

There are two main uses for procedures:

1. Support competent people to perform a task correctly;
2. Support people (trainees) to become competent to perform the task using the procedure.

Other uses of procedures should be considered secondary, and only covered if they do not detract from the main uses (above). Whilst the aim should be to make procedures as accurate as possible, they will never be 100% correct. Adding details to address minor compliance issues will quickly detract from the main uses.

There is some guidance available about writing procedures from HSE and others, but it tends to focus on addressing format instead of content; and does not really cover the format and does not help to decide if the content is appropriate or even whether a procedure is required. The checklist aims to assist you in deciding if a procedure is suitable for the main use (as above).

Question	Evaluation
Is the task still carried out?	
Is it covered by another procedure?	
Could it be covered by a generic instruction?	
Why was the procedure generated? • Genuine need • Knee jerk reaction to an incident or event.	
Did people who perform the task develop the content of the procedure?	
Is the procedure practical, realistic and preferred by the people who perform the task?	
Does the procedure have enough detail for the least experienced competent person likely to perform the task? (Trainees should be accompanied until they are competent, so there should be no need to write the procedure for someone who is not competent).	
Does the procedure have more detail than will be required by the least experienced competent person?	

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Question	Evaluation
Are the people who perform the task happy with the format?	
Do the people who perform the task understand every abbreviation and acronym used?	
Is a system in place to ensure only the most up to date procedures are used?	
Does the procedure title and date of issue appear on every page?	
Does the page numbering ensure no pages can be lost?	
Is the procedure readily available where the task is performed?	
Are any unofficial written instructions referred to when performing the task?	
Has training provided people with the skills and knowledge they need to perform the task?	
Is the use of the procedure emphasised during training, toolbox talks, work planning etc.?	
Has peoples' ability to perform the task been assessed?	
Are people able to maintain the competencies required to perform the task?	
How is compliance with procedures ensured?	
Have questions raised in the past been dealt with adequately?	
Is the task ever performed with a method different from in the procedure?	

AB Risk
Limited