## Writing Recommendations:

A common mistake made by consultants is to see our value coming from spotting issues and writing recommendations. It's important to remember we are building a partnership with our safety contact person, and the last thing any of them need is more things to do.

Your recommendations must be clearly written and relevant to the client. Don't overwhelm the member by writing 50 recommendations, because they will have no idea where to start. Combine multiple recommendations into a single recommendation whenever possible.

### **SMART Goals and the Core-4**

## Writing SMART Goals

**Specific** - identify a clear, precise outcome to be achieved.

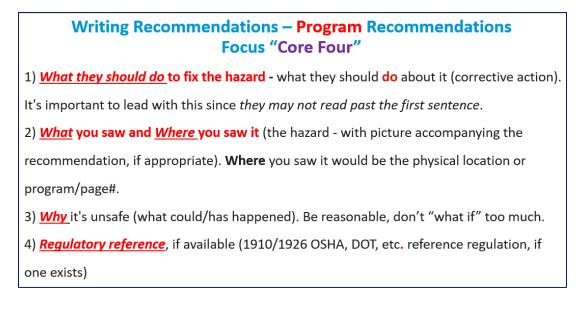
Measurable - use quantifiable metrics that can be used to track progress.

Achievable - make it challenging but within realistic reach .

**Relevant** - aligned with the overall safety objectives for the organization.

**Time Bound -** provide specific deadlines or timeframes for completion.

**Every recommendation should contain at least 3 of the Core Four** (the regulatory reference does not always apply).



#### **Recommendation Numbering:**

There are 2 types of Recommendations, and most of the captives separate the two types on the REC document:

- 1. Program Recommendations which only come from the Risk Control Assessment (RCA).
- 2. Hazard Recommendations which are observed hazards from a site visit.

\*If you have suggestions based on "Best Practices", these should go in the Letter (or RCR) – not in the Recommendations. (for example – "It is recommended to deliver Situational Awareness training for your employees because 49% of injuries were from slips, trips, and falls" should be included in comment section of the RCR (Captive Resources) or the Letter (Artex) – NOT THE RECs.

- Program Recommendations Start with the letter "P"
  - PYY-MM-Recommendation #
  - First Program recommendation for a visit done at a client site this month would be "P21-08-01"
  - Second Program recommendation for a visit done at a client site this month would be "P 21-08-02"
  - Third Program recommendation for a visit done at a client site this month would be "P21-08-03"
- Physical Hazard Recommendations DO NOT Start with anything
  - YY-MM-Recommendation #
  - First Hazard recommendation for a visit done at a client site this month would be "21-08-01"
  - Second Hazard recommendation for a visit done at a client site this month would be "21-08-02"
  - Third Hazard recommendation for a visit done at a client site this month would be "21-08-03"

## CAPTIVE PROGRAM NAME

<<MEMBER NAME>>

#### <<LOCATION>>

# **PROGRAM RECOMMENDATIONS**

<<VISIT DATE>>

## **NEW RECOMMENDATIONS:**

| P23-MM-01   | Writing Program Recommendations  |
|---|--|
| Program<br>Recs always                                    | Focus on <u>Three</u> of the "Core Four"   |
| start with  | 1. What the issue is – what does the captive require based on the RCA question?  |
| the letter <b>P</b> ,<br>followed by<br><b>the year</b> , | It was noted during the assessment that the company does not have a safety manual.   |
| month, and  | 2. What they should do to fix the hazard – what is the corrective action?  |
| rec. number<br>from that<br>visit                         | a. Don't write a recommendation without giving them clear guidance on what to do about it.   |
|   | b. This is an opportunity to show your value if you can assist them with the corrective action.  |
|   | Consideration should be given to developing a safety manual that<br>includes sections which address the Safety Committee, Accident<br>Investigations, Required Recordkeeping, Hazard Surveys &<br>Corrections, Job Safety Analyses, and Disciplinary Action for Safety<br>Policy Violations. |
|   | 3. Why they should make the change – What's In It For Them?  |
|   | A safety manual ensures safety consistency; rules, guidelines, and<br>policies are clearly communicated to all employees, and when key<br>employees leave there are guidelines for their replacements to<br>follow.  |
|   | STATUS: Will be one of these: New, In Process, Completed   |

## CAPTIVE PROGRAM NAME

<<MEMBER NAME>>

<<LOCATION>>

## **HAZARD RECOMMENDATIONS**

<<VISIT DATE>>

