

## 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).

### Writing Recommendations – Program Recommendations Focus “Core Four”

- 1) **What they should do to fix the hazard** - what they should **do** about it (corrective action).  
It's important to lead with this since *they may not read past the first sentence*.
- 2) **What you saw and Where you saw it** (the hazard - with picture accompanying the recommendation, if appropriate). **Where** you saw it would be the physical location or program/page#.
- 3) **Why** it's unsafe (what could/has happened). Be reasonable, don't “what if” too much.
- 4) **Regulatory reference**, if available (1910/1926 OSHA, DOT, etc. reference regulation, if one exists)

## 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:

<p>P23-MM-01</p> <p>Program Recs always start with the letter <b>P</b>, followed by <b>the year, month,</b> and <b>rec. number</b> from that visit</p>	<h3>Writing Program Recommendations</h3> <p>Focus on <u>Three</u> of the “Core Four”</p> <ol style="list-style-type: none"><li><b>1. What the issue is</b> – <i>what does the captive require based on the RCA question?</i><ul style="list-style-type: none"><li>➤ <b><i>It was noted during the assessment that the company does not have a safety manual.</i></b></li></ul></li><li><b>2. What they should do to fix the hazard</b> – <i>what is the corrective action?</i><ol style="list-style-type: none"><li>a. Don't write a recommendation without giving them clear guidance on what to do about it.</li><li>b. This is an opportunity to show your value if you can assist them with the corrective action.<ul style="list-style-type: none"><li>➤ <b><i>Consideration should be given to developing a safety manual that includes sections which address the Safety Committee, Accident Investigations, Required Recordkeeping, Hazard Surveys &amp; Corrections, Job Safety Analyses, and Disciplinary Action for Safety Policy Violations.</i></b></li></ul></li></ol></li><li><b>3. Why they should make the change</b> – <i>What's In It For Them?</i><ul style="list-style-type: none"><li>➤ <b><i>A safety manual ensures safety consistency; rules, guidelines, and policies are clearly communicated to all employees, and when key employees leave there are guidelines for their replacements to follow.</i></b></li></ul></li></ol> <p><b>STATUS:</b> Will be one of these: <b>New, In Process, Completed</b></p>
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# CAPTIVE PROGRAM NAME

<<MEMBER NAME>>

<<LOCATION>>

## HAZARD RECOMMENDATIONS

<<VISIT DATE>>

23-MM-01  
Hazard  
Recs  
always  
start with  
the **year**,  
**month**,  
and **rec.**  
**number**  
from that  
visit

### Writing Hazard Recommendations

Focus on All Four of the “Core Four”

1. **What the issue is and where you observed it during the walk-through** – *what did you see and where did you see it?*
  - a. Be specific about the location of the hazard in your text – always include pictures, but don’t rely on the pictures for them to figure out where you were when you saw it.
    - ***While walking through several locations in the warehouse, it was observed that the direction of travel to the nearest exit was not clearly marked. .***
2. **What they should do to fix the hazard** – *what is the corrective action?*
  - 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 by offering options for them to consider.
    - ***Consideration should be given to adding exit signage to the area. The nearest exit should be visible from all locations in the building. If you can’t see the EXIT sign above the door, then directional signs must be in place.***  
***A 3-sided exit sign hung from the ceiling in various locations will solve this problem.***
3. **Why it’s unsafe** – *What could/has happened or why does the situation need to be addressed?*
  - ***In an emergency situation it is important that the path to safety is clearly identified.***
4. **Regulatory Reference** – *Is there a regulatory requirement (OSHA, DOT, NFPA, etc.?)*
  - a. Don’t cite a regulatory reference without making sure you are correct (it’s better to not put one than to put one that is incorrect).
    - ***OSHA requires exit signage to be provided when the direction of travel to the nearest exit is not readily apparent. 1910.37(b)(4)***

**STATUS:** **New, In Process, Completed** (Will be one of these)

**NOTE:** Include pictures at end of recommendation.



Exit Sign hung from ceiling