



Embracing Checklists for Your Job Responsibilities

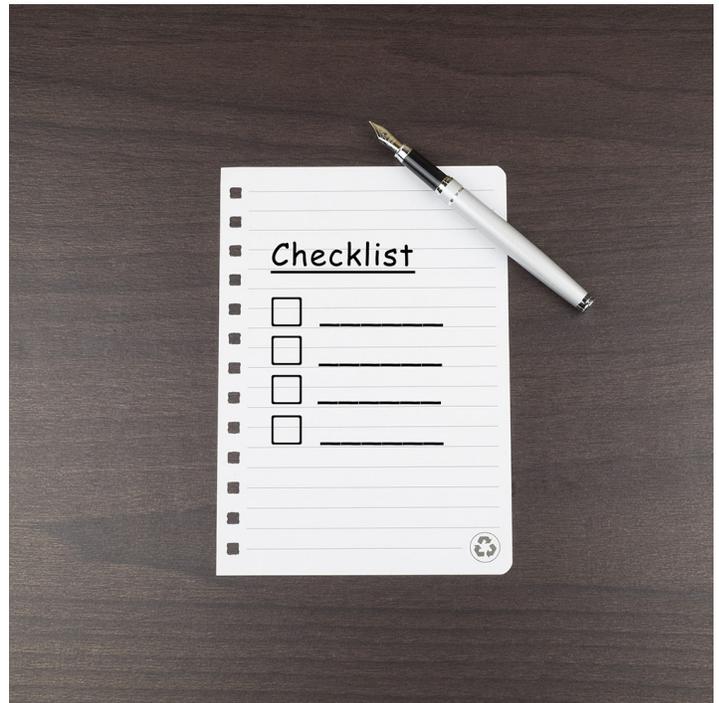
Since starting these monthly Focus on Facilities we frequently use a checklist to provide an efficient means to communicate and to encourage readers to download each checklist for their own use. Last month we introduced many a reader to *Atul Gawande* and his book, “The Checklist Manifesto” (2009). This book is just one of many success stories featuring the development and application of one’s use of checklists. That said, embracing the use of checklists can begin with questioning the value of checklists by asking “Why?” five times. This technique helps an individual or a problem solving team explore the cause and effect of developing and using a checklist.

The primary goal for this particular exercise is to help one embrace the use of checklists in their personal and professional life. Checklists are a time-tested quality control tool, so let’s try to prove checklists work and from there inventory the approach to creating a checklist.

1-Why are checklists so useful? Because checklists catalog the things-to-do. For example, a facility manager will delegate a work order assignment to a maintenance technician e.g., central air-handling unit (see attachment work order) and with this work order in-hand the next question should be asked:

2-Why can checklists help complete the work? Because checklists assign individual tasks things-to-do. For example the checklist assists in preparing for performing the work order e.g., lock-out, tag-out special instructions to shut-off and secure the electrical power to the central air-handling unit.

3-Why can checklists save time completing the work? Because checklists bulletize each task versus not listing each things-to-do. For example the checklist eliminates the potential for miscommunication between what the manager is expecting to be done and how much time it will take versus what the maintenance technician believes the tasks are and the time required to complete each task.



4-Why can checklists be used to document the progress?

Because checklists, when filled out as the work is completed documents that the work was completed. For example, the checklist is now a planned maintenance work order and it is assisting the technician in checking off the work completed and doing so within the time constraint of each task.

5-Why can checklists be a quality control process?

Because checklists, such as the example planned maintenance work order/checklist, allows the facility manager to randomly select a few completed work orders and walk the equipment room reviewing the work noted as complete on these checklists. For example, if a work order was simply checked off e.g. central air-handling unit that the filters were changed, a visual inspection by the manager can confirm this work was not done and a discussion can occur between technician and manager to explain the poor quality control of completing a specific work order.

Checklists often have multiple uses based on the 5-Why's, as well as other benefits including:

- It lists the tasks that need to be done
- It confirms the tasks, as well as special instructions have been completed
- It can include categories, such as estimated time to complete, percent of task completed e.g., 50% done, link to another checklist e.g., electrical data sheet associated to a central air system, etc.
- It captures the mundane but equally important and often repetitive things to do e.g. draftsman's drawing checklist noting tasks, such as complete room names and numbers, complete drawing title block, etc.
- It is a means for the individual e.g., draftsman to keep a record on the associated drawing checklist indicated work remaining to be done
- It is a quality control business tool for a supervisor or project manager to quickly review the checklist and compare the work completed versus the actual drawing review
- It is a quality control business tool to compare work completed versus time and cost to finish the task e.g., draftsman checklist in progress can provide the individual with an estimated number of hours to complete the task.
- It is a quality control, standardized document that can be continuously be enhanced over time and with frequent uses.

The use of standardized checklists, it is safe to say are used in every business activity because these quality control business tools enhance, as well as document the results. They also remove the discussion and misunderstanding between manager or supervisor, and the individual performing the work and filling in the checklist(s).

Organization certification, such as LEED (leadership in energy and environmental design) and just about any other certification program uses a checklist as their standardized method to meet the task requirements, inventory and score the activities, and be a check-and-balance to certification compliance. Other checklists are simple one's Things-To-Do list for the day, the week, the project, etc.

It is important to note that anyone can create their own checklist(s) for their personal needs, as well as to help them improve their performance at work. These work lists can be compared to goal setting too. If one thinks

about it e.g., a draftsman and a goal to complete a contract document for a construction job. The goal is to efficiently finish a specific drawing and the milestones along the way are the individual tasks to be completed on the drawing checklist.

Creating a checklist the following are our suggestions:

- The title e.g., *Equipment Room 1 HVAC Drawing* is the document and completing this document and having the project manager signoff on its completeness is the goal.
- Itemize all the repetitive tasks e.g., column lines and numbers, room names and numbers, rated walls, fire dampers, smoke dampers, etc. with a check box next to the task to insert "percent complete" and a "remarks" per task for special notes e.g., coordinate smoke dampers with fire alarm system.
- Individual, specialized tasks such as "hot water piping" with check boxes adjacent to the associated task for supplementary tasks: direction of flow arrow, pipe identification, pipe expansion, etc. with each of these boxes checked off as these associated sub-tasks are completed.
- With each itemized task it is always good to include a budgeted time e.g., minutes or hours to assist in posting the completion expectation to guide the individual doing the work and to review and raise time element based on actual work completed to continuously what level of work is needed.
- At the top of the checklist should be a date, name of individual completing the work, and a place for a reviewer to sign-off on the work after reviewing the goal.

An additional benefit to the use of checklist lists is the job or personal satisfaction as one can see the work getting completed and then the satisfaction of signing off on the document when the work is done.

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