

Planning Necessary For Ergonomic Program Success

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“So, that’s what makes an ergonomic program work,” my colleague noted in a recent discussion. She was reacting to data that I had provided on the need for careful planning in an ergonomic program. That’s because planning is one of the primary indicators of ergonomic program success.

In a study of forty ergonomics programs which I conducted, only 30% were deemed to be successful, while 57% were found to be floundering. This study was conducted in order to make a simple determination: Do ergonomics programs work? This determination was based not on whether a program continued some activity or whether a committee was still meeting, but instead on whether the results were at least commensurate with the efforts that went into the program. The term "floundering" was then used to describe programs where the time and money spent on the program were clearly in excess of the results being achieved.

In this study, the causes of floundering were assessed, and by a 2-to-1 margin, floundering was due to managerial issues rather than to technical failures. Managerial causes for floundering included lack of direction and focus, lack of objectives, lack of resources, and lack of coordination among internal company departments such as engineering, medical and safety. Since lack of planning is one of the most common reasons for ergonomic program failure, how do you plan?

There are two types of planning: strategic and tactical. Both are important. Strategic planning answers the question: “What do we want the ergonomic program to do?” To answer this question, senior managers and the ergonomics committee should imagine what they want the ergonomics program to accomplish. This means that the statements “we want to do ergonomics” or “we want to implement ergonomics” are not appropriate answers. Ergonomics, like a computer system, is a tool which helps to do something desirable for the organization. It has little value without a goal. The ergonomics program should have at least one specific, measurable goal such as reducing workers' compensation costs by 50% or reducing the number of lost workdays by 70%. Remember, the more specific the goal, the easier it will be to achieve. In the strategic planning session, some questions to answer include:

- What do we want the ergonomics program to do?

- How do we monitor results and what data do we measure to demonstrate progress with ergonomics?
- What are the barriers and how can they be overcome?
- What policy issues are likely to be affected?
- Who is/should be involved, and what are their roles?
- How important is ergonomics relative to other safety and health issues for our company?
- What is our general plan?

Tactical planning, the key to actually getting things done, answers the questions: "How do we accomplish this goal?" and "What are the specific steps we must take?" Best done in a workshop type setting with the ergonomics committee, a typical, 8-16 hour tactical planning session will really help "jump start" the program. Remember, tactical planning is the link between the goals of the ergonomics program and the specific projects undertaken. Tactical planning will answer the questions:

- What should be done?
- When should it be done?
- Who should do it?
- What are the quality standards?

A practical way to lead the tactical planning is to ask what needs to be done in each of the major areas of the ergonomic program. For example, the major activity areas include projects that help correct existing problems, projects that help prevent future problems, training needs, establishment of medical management procedures and protocols, project evaluation protocols, and periodic program audits. By examining each area individually, lists of needed actions can be developed which can then be integrated into a tactical plan covering the next 6-12 months.

Managing the plan then becomes as easy as making monthly assignments and following up on actions, and, of course, making periodic updates to the tactical plan so that it remains current.