

Creating standard operating procedures (SOP)

Overview

This standard covers the competences required to create standard operating procedures (SOP) for work activities.

This will involve co-ordinating, analysing and documenting the information gathered from the method used when performing the operation/process. You will confirm what preparations are required from start to finish, the quality and safety standards to be maintained, and the drawings, tooling, fixtures, gauges, and other items that are used during the operation or process. You will need to highlight 'key points' in the document, using drawings, photographs and/or sketches, as appropriate.

You will be required to ensure that those involved in performing the operation or process have the opportunity to contribute, and agree the method identified.

You will also be required to produce standard operating procedures for a range of activities, such as cleaning of equipment, maintenance of equipment, health and safety practices and procedures, process procedures, manufacturing operations and quality improvements.

Your responsibilities will require you to comply with organisational policy and procedures for the activities undertaken, and to report any problems that you cannot solve, or that are outside your responsibility, to the relevant authority. You will be expected to take full responsibility for your own actions within the activity, and for the quality and accuracy of the work that you carry out.

Your underpinning knowledge will provide a good understanding of your work, and will provide an informed approach to the techniques and procedures used. You will need to understand the principles and procedures for creating standard operating procedures, and their application, in adequate depth to provide a sound basis for carrying out the activities to the required criteria.

Applying safe working practices will be a key issue throughout.

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Performance criteria

You must be able to:

1. work safely at all times, complying with health and safety and other relevant regulations, directives and guidelines
2. co-ordinate gather and analyse the current operation or process to identify the optimum and safest method
3. confirm what tools, equipment, fixtures, documentation and standards are required
4. ensure that all operators performing the operation or process have the opportunity to contribute to the SOP
5. produce standard operating procedures in an agreed format and monitor their use against the operation or process requirements
6. supply standard operating procedures at their point of use, and store in accordance with organisational requirements
7. revise standard operating procedures, as appropriate, to ensure their effectiveness in the workplace
8. confirm that the SOP defined will meet quality, productivity, health, safety and environmental requirements

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Knowledge and understanding

You need to know and understand:

1. how to work safely at all times, complying with health and safety and other relevant regulations, directives and guidelines
2. the various formats used in creating SOP
3. the organisational requirements and format for SOPs
4. the information that will be required to create a SOP
5. how SOP are structured, and the importance of their use
6. methods of communicating/facilitating to ensure that all the required information for the SOP is captured
7. the operation/process to be captured in the SOP
8. why SOP are the basis for quality and continuous Improvement
9. the eight wastes and how to eliminate them
10. how to simplify work done, eliminating waste and potential for human error
11. Takt time, and the relationship with achieving flow in a process
12. the extent of your own authority, and to whom you should report in the event of problems that you cannot resolve

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Scope/range related to performance criteria

1. Produce a standard operating procedure for **one** of the following:
 1. cleaning of equipment
 2. maintenance of equipment
 3. health, safety and environmental practices and procedures
 4. process procedures
 5. manufacturing operations
 6. quality improvements
 7. improvements to customer satisfaction
2. Produce standard operating procedures that include **all** of the following (as applicable to the organisational requirements):
 1. operation/process to be performed
 2. part/product number and part/product description/operation reference
 3. operation/process number
 4. preparation activities prior to starting the operation/process
 5. description of the full operation/process, broken down into appropriate tasks/activities
 6. quality standards, health and safety requirements, environmental issues/requirements
 7. tooling/fixtures/gauges/equipment required
 8. sketches/photographs/drawings that assist completion of the operation/process
 9. date of first issue
 10. originator of the document
 11. latest revision date
3. Produce standard operating procedures that minimise **all** of the following:
 1. time
 2. effort
 3. waste

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