

Ethics
ROY PAULSON—PART 4
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Saundra called him the next morning and invited him to a special meeting to review the training systems plan. He said that it wasn't finished quite yet. She said that was OK; "Just bring the draft to my office around noon."

Roy spent the rest of the morning putting together another computer presentation and got to Saundra's office at noon. They went over the complete presentation, including a slide labeled *MWD Training System* (based on his phone call with MWD). They reviewed the plan together and discussed how it would need to be changed to fit with the NEWCO organization. For example, NEWCO didn't have an industrial hygiene department, so they deleted that section from the plan. They also moved some responsibilities around and made other minor modifications. It still looked a lot like the MDW plan but seemed to contain the needed elements for NEWCO. When they were finished, Saundra asked him to change the title to *Proposed NEWCO Training System*.

"After all," she said, "This is the basis of the plan, even if it's not operational yet."

Roy made the change on the spot.

"Great," Saundra said, "I think we're in good shape. Let's go into the meeting."

"I thought this was the meeting," Roy replied.

"Oh, I'm sorry, I thought you knew. We're presenting our plans to the full board and representatives of the regulatory agency today. Aren't you getting the notifications yet? I've *got* to talk to my secretary to update the distribution list. I'm sure I told her to do it a week or two ago. Anyway, you're here now."

To say that Roy was shocked would be an understatement, yet here he was following Saundra into the boardroom, filled with about 25 people, some of whom he recognized, many of whom he did not.

Saundra started the meeting by welcoming the group and thanking them for all their help and patience in getting NEWCO back on its feet. She knew that it had been a struggle but felt that things were going very well. As a matter of fact, she was pleased to announce that NEWCO had just won the Community Employer of the Year award and that the announcement would be in the evening paper. The company was being singled out for its work in keeping jobs in the community and helping to employ the disadvantaged. She then went around the room and introduced everyone, saying a few words about their contributions to the project. When she got to Roy, she said:

“I’m particularly pleased to introduce Roy Paulson to the group. As you know, Dr. Paulson is a recognized expert in training and task analysis. He’s been working with us for some time now to develop and document our training plan, which we believe will be the benchmark for others to emulate. He’s also been conducting a number of job and task analyses to ensure that all of our processes are uniform and safe. We’re glad to have him on our team.”

She then continued, introducing the rest of the staff and a few community board members.

After 30 minutes of discussion about financial matters, which, although improving, were still not good, Sandra invited Roy to the front of the room to bring the group up to date on the state of the training plan. Roy began:

“Thank you, Sandra, for the opportunity to speak to the group and for such a warm, if not overstated, introduction. I have been working on the training plan and ...,” and he went into a discussion of his efforts to date (not mentioning his call to MDW). He went through all of his slides, and the group seemed impressed with the logic and structure of the plan. A few even commented that they were impressed that he was able to develop so comprehensive an approach so quickly.

During a break, Roy approached Sandra and expressed concern that his draft plan was being presented as the final plan. Sandra reassured him that this would be no problem as the presentation was primarily to please the regulators and to get them to cut NEWCO some slack. Once the pressure eased a bit, they’d have time to go into the details, “cross the ‘T’s and dot the ‘I’s, as it were.” They could change it as needed; it was, after all, a living document meant to be used as a tool. It wasn’t some policy to be written and stuck on a shelf to gather dust.

Roy spent the rest of the meeting in a daze. The regulatory team stated that they were happy with the progress being made and complimented Sandra, Ken, Roy, and others on their progress. However, there was still a lot of work to do. They were particularly interested in seeing the critical SOPs finished and, again, reiterated a very tight deadline. Roy felt his heart sink as he realized that there were to be no further extensions of the timeline and that he wouldn’t be able to complete the job on time.

As the meeting came to a close, Sandra was surprisingly upbeat, thanking the group for their thoughtfulness, suggestions, and assistance. Sandra promised the regulators that the critical tasks would be documented and standardized within two weeks and that she looked forward to continuing to work with them to maintain the long-standing tradition of NEWCO as an industry leader and a responsible member of the community. She then closed the meeting, asked her management team to take a quick break, but to return for a debriefing.

Roy, visibly upset, started the conversation: “I know this is important, but there is no way I can meet the deadlines we just agreed to. There are simply too many critical tasks to write up. Each SOP takes me a minimum of 4 days, and we’ve got at least a dozen to do. I’m not going to make it.”

Ken replied, “Take a deep breath; relax. I’ve found someone to help you. His name is Tom Davis. He has over 20 years’ experience in the industry and knows a lot about training, process documentation, and SOP development. I think you’ll like the guy. Here’s his number; give him a call and see if you can get him on board as a subcontractor.”

Back in his office Roy telephoned Tom Davis who seemed to be expecting his call. “Ken and I go way back” he said. “He’s filled me in on some of the things NEWCO needs, and I think I can help. What say we meet tonight for dinner and to discuss the details of my working with you?” They agreed on a place and time.

Roy went back to the production floor to talk with Jim. “Saundra told me that she’d back whatever you think is the best way to do the work,” he told Jim, “but I’m still concerned about the potential dangers of using the broom handle with the reset and breakers. I mean, we’re going to be using the SOPs to train new employees, and the process isn’t accurate.”

“Look” said Jim, “everyone out here knows that it’s not accurate, but we also know it’s what has to be written down if we’re going to get on with the work. We also know how to deal with the problems without causing a lot of extra expense, losing time, or having to call in the electricians just to reset a circuit breaker. So what’s the problem? When we train a new employee, he’s out here with an experienced worker. We supervise him closely; show him the ropes and all the little shortcuts we use to get things done. Besides, if a new worker does use your SOP as written, what’s the worst thing that could happen? The circuit wouldn’t reset, and he’d have to call for help.”

Although he didn’t like it, Roy couldn’t find an error in Jim’s logic. There wasn’t any danger if the SOP were followed; the circuit just wouldn’t reset, and the equipment wouldn’t start. So he signed off before leaving to meet Tom Davis.