

Making Effective Use of Standard Operating Procedures (SOPs)

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Standard Operating Procedures (SOPs) are not new to dairy farms – to be compliant with the Canadian Quality Milk program (now called the Food Safety module of proAction), all farms have written SOPs relating to pre-, post-, and milking procedures, including procedures for milking cows with abnormal or treated milk. With the addition of the Animal Care elements of proAction beginning this month, farms will require additional SOPs, including those on colostrum management and calf feeding, euthanasia, and for conducting calf health practices such as disbudding/dehorning, castration, and supernummary teat removal. If you do not currently have SOPs for these areas of your management, this is a good opportunity to review your procedures and get everyone on the farm on the same page. While some may view these new requirements as simply additional paperwork to complete, well-developed SOPs combined with staff training can be an excellent tool to improve on-farm performance and keep staff motivated. The time you invest in drafting SOPs for proAction will provide an opportunity to further improve the health and welfare of cattle on your farm.

Standard Operating Procedures are step-by-step instructions designed to help farm staff conduct specific tasks. The goal of an SOP is to standardize how a task is performed and reduce the chance of error. Milking procedures are a good example of how SOPs can help. Milking SOPs ensure milkers thoroughly know the step-by-step procedures of how you want your cows milked, from preparation of the system for milking to prepping cows, attaching units, and performing post-milking system cleaning. The milking SOP helps prevent mistakes and makes sure cows get a consistent experience at every milking. Applying the same logic to other areas of your operation can help improve the performance of these systems too.

For procedures which include few decisions and less than 10 steps, a simple step-by-step guide is best, while a procedure with more steps is better shown with a tree-diagram or graphic. A flow chart is more suitable for those with many decisions. Colostrum feeding on most farms will likely be a simple step-by-step guide. Steps to include could be procedures for prepping and milking the cow, assessment of the colostrum for quality, what to do if quality is below acceptable, obtaining clean feeding equipment, feeding an appropriate amount to calf by a specific method, cleaning used feeding equipment, and finally (but not least importantly) documenting what occurred in a computer or log book. The exact nature of these steps may differ between farms, but within a farm it is best if these procedures are consistently done, no matter who on the farm does them. SOPs will help with this.

When writing the SOPs, the steps should be simple, clear, and as short as possible. Avoid long sentences involving multiple steps. Point form, 'bullet points', or a numbered list of steps are a great way to make a very readable document. The level of detail should include all important steps, but not every possible detail. Too much detail makes the document less readable and may offend experienced workers. For the most part, SOPs are expected to be 'what' and 'how' to perform tasks, but not provide the 'why' to do it within the steps. Training of staff is essential to having a useful SOP. During training more detail can be discussed, including justification for why the SOPs are being done the way they are, and clarification can be provided when staff have questions. Keeping the SOP in a location where staff can easily access them if they need clarification or a refresher is also critical.

While a well-written SOP is a necessary first step, a perfect SOP is pretty useless sitting in a binder while people on the farm responsible for the procedure aren't following it. There are two keys to successful implementation – development of the SOP and staff training. Developing the SOP in consultation with those who perform the task is essential to generate support for the document. Having a meeting to develop the SOP where input is sought from all parties including the manager or herdsman, people responsible for the task, and advisors such as your herd veterinarian, will foster teamwork. People are more likely to support a process they had a hand in developing. Effective training of all staff on the procedures avoids assumptions that everyone knows how to do the steps, or that everyone interprets the steps similarly. Training should also include an explanation of why the steps are done; staff are more likely to remember and support the process if they understand the importance of each procedure. For example, if calf feeding staff understand that a newborn calf's gut is very porous to bacteria, they will be more likely to implement the colostrum SOP steps, like thoroughly cleaning teats before colostrum collection and sanitizing feeding equipment, that reduce the risk of feeding bacteria-laden colostrum to calves. If possible, training sessions should be hands-on – this helps instill confidence if the procedure is new to an employee, and also offers the chance to make sure nothing ends up 'lost in translation'.

It takes time and commitment to develop a well-written SOP that will be supported by your employees. Taking the time to provide training will ensure that everyone knows what is expected and why. The initial investment in the effort to write and implement a good SOP should pay off by boosting performance, helping save time by preventing mistakes, ensuring tasks are performed uniformly by employees, and fostering teamwork which helps keep people motivated.

Why not use the proAction Animal Care SOP requirements as an opportunity to ensure everyone on your farm is well-trained and committed to doing a great job?

This article was based on a resource by Penn State Extension, "Standard Operating Procedures: A Writing Guide", which has further information and is available to download at:

http://extension.psu.edu/animals/dairy/hr/tools-for-dairy-employee-supervisors/ud011/pdf_factsheet

Specific information on required elements for the proAction Animal Care SOPs are available by logging into <http://canadianqualitymilk.org> and looking for "proAction SOP Templates" under "Forms and Documents"