THE POWER OF LEARNING TEAMS

Unleashing Collective Knowledge

SAFETY SOLUTIONS

The H.O.P. Coach

The New View of Health and Safety is:

>> Leadership driven – Leaders are constantly questioning methods, plans and procedures, listening and responding in ways that support organizational and operational learning. Leaders recognize learning as "real work".

>> Directed to improve organizational learning at the blunt end (leadership) by understanding how decisions made at the blunt end affect work at the sharp end (workers).

Sharp end

Workers

Communication

Supervisors

Managers

Department Heads

Decisions/Process Results

Executives

Blunt end

>> Focused on operational learning by understanding:
* Work-as – done at the "sharp end" as opposed to work-as-imagined.
* Competing goals, organizational factors and variability of work that influence safety, health, quality and process improvement.

>> A systems approach that recognizes the critical importance of unfiltered information flow and communication throughout the organization particularly from the sharp end to the blunt end.

Organizational and Operational Learning Concepts

Why is operational learning necessary?

The success of organizations in the future is dependent upon their ability to engage employees at all levels of the organization, to work together collaboratively and learn at both the operational and the organizational level. A learning culture is needed – one that supports open unfiltered communication of information, some of which may be difficult for managers and learders to hear. When leadership responds to problems and failures in positive manner, learning can take place resulting in a safer and more healthy workplace. Learning teams are a necessary and powerful tool to build and strengthen the learning culture.

Human Error

More flawed defenses and error precursors

Individual is counseled and/or disciplined

Latent organizational weaknesses persist

Blame Cycle

Reduced Trust

Management less aware of jobsite working conditions

Less Communication

DOE STANDARD , HUMAN PERFORMANCE IMPROVEMENT HANDBOOK
VOLUME 1: CONCEPTS AND PRINCIPLES, page 131
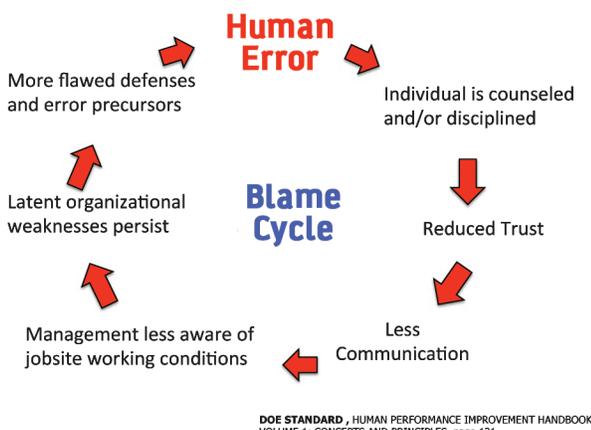
Blame is an enemy of learning.

Learning Organization Assumptions: Setting the Stage for Success

>> Blame is an enemy of learning.
>> Open communication and feedback are vital.
>> The organization's response to failure matters.
>> Everyone comes to work to do a good job.
>> Everyone wants to contribute to organizational improvement.
>> Leaders need to surrender some control to those on the learning team.
>> Our organization cannot succeed unless we take advantage of everyone's knowledge and skill – we need to learn from one another.
>> Work is constantly changing because of process variability and many other internal and external factors.
>> No one wanted the incident or failure to occur.

Look, Listen and Watch for Weak Signals

Work as Planned vs. Work as Performed

Work as planned

Work as performed

Becoming "masters of the blue line"

Normally Successful!
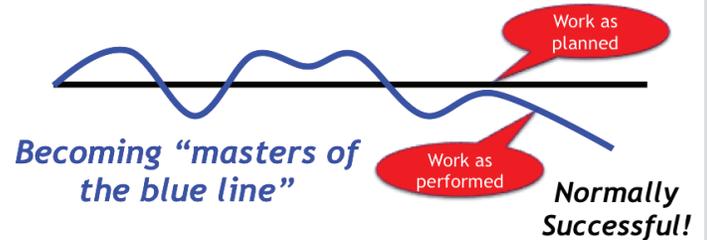
(Conklin / Edwards)

The black line represents the way a job was planned – what is tyically in the procedure manual that is work-as-planned. Is this the way work is actually performed? The blue line represents the way a job is actually done, work-as-performed. Marny variables affect the blue line such as staffing, tools and equipment available, training, supervision and production pressure to name just a few examples.

Look for
>> Apparent anomalies (outliers)
>> Operational surprises
>> Small equipment issues
>> Seemingly small near misses
>> Employee concerns
>> Employee statements:
> "Somebody is going to get hurt some day"
> "You have to be careful"
> "Well it normally works fine"
> "I recently noticed"
> "I didn't want to say anything, but . . ."

Opportunities for organizational and operational learning are all around us – if our goal is learning and not simply compliance or blame
>> Inspections
>> Investigations
>> Pre-task assessments
>> Post-task debriefs
>> Learning teams
>> Non-events and near misses
>> New designs
>> Product and process changes
>> Successes

Learning Teams

Learning teams can be a powerful tool to build organizational and operational learning – but remember there are several other tools and methods. Implementation of learning teams is not difficult and every organization has many employees with the potential to be great learning team coaches.

Operational learning after an incident
>> Tells the story as each person saw the event
>> Tells the story of complexity
>> Tells the story of normal variability and coupling
>> Tells the story of how work gets done.
>> Improves our understanding or processes and the system.

Operational learning is not
>> An investigation
>> Worried about collusion
>> Searching for "one true story"
>> Focused on the one "root cause"
>> Looking for someone to blame
>> Another committee

Qualities of a Learning Team Coach
>> Good listener – Inquisitive
>> You must be 'teachable', willing to learn from others
>> Non-judgmental (or at least act like it)
>> Open minded – don't have too much ownership
>> Humble
>> Engaging – Keep the team's attention
>> Street credibility

When should I form a learning team?
>> Not for everything (resources!!)
>> Incidents with high learning and/or severity potential
>> Post-event (Injury/Quality/Operations)
>> Near Miss or Close Call
>> Good Catch
>> Interesting Successes
>> High Risk Operations
>> Challenging Design Problems
>> Anytime you can't explain something.

How do I do this?
>> Pull the right people together
>> Set them at ease – explain the learning team approach
>> Give them time and space to learn and discover
>> Create an open dialog (Trust)
>> Find the common ground
>> Ask meaningful questions
>> Listen and learn (Be interested)
>> Take notes on chart paper – hang the notes on the wall
>> Empower the team to help solve the problems.

Learning Team Hurdle

The Pressure to Fix . . .
. . . Outweighs the Desire to Learn!
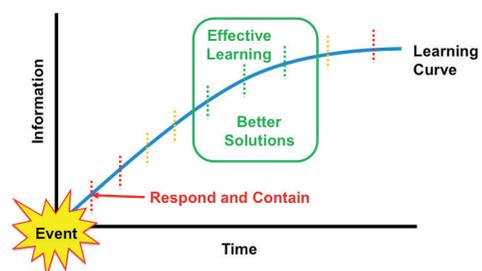
Who should be on a learning team?
>> Learning team coach
>> Those close to the event or issue
>> The person(s) involved in the event or issue
>> Someone from outside the process
>> Support members as needed
>> Union safety rep/steward
>> * Area supervisor (maybe best in session 2)

Note: You need a diverse learning team and may need to manage the manager out.

* The decision to include the supervisor depends on: the topic of the learning team, culture of the organization and whether the supervisor's presence will discourage open discussion.

The Learning Team Process
→→ Determine need for Learning Team
→→ 1st Session – **Learning Mode** only
→→ Provide "**Soak Time**"
→→ 2nd Session – Start in Learning Mode
→→ Define defenses / build new ones
→→ Tracking actions & criteria for closure
→→ Tell the story.

Session 1 – Problem Discovery
Sample questions for Session 1

Make sure everyone is at ease. Ask open-ended questions.
Don't let the team jump to fix-it mode.
Focus on 'how' instead of 'why'.
Emphasize understanding work and learning.

>> Tell me about your work.
>> Don't start with the event.
>> Start by talking about normal work to undertand context.
>> What does normal work look like?
>> How hard is it to get things done?
>> What frustrates you on your job?
>> What doesn't make sense?
>> What do you do to make the job easier?
>> How doable are your procedures?
>> What tools do you have and do they work well?
>> What were the conditions leading up to the event?
>> What other near misses have you seen in this area?
>> What worked well? What failed or went wrong?
>> Where else could a similar event happen?
>> What else should I know? Who should this be shared with?
>> How did the actions or inactions of those involved make sense in their context? (not yours!)
>> GET EVERYONE'S IDEAS.
>> Who else should we invite to the next session?

> **"**
> # We need to live in the context and not the consequences of events."
> Todd Conklin

System View
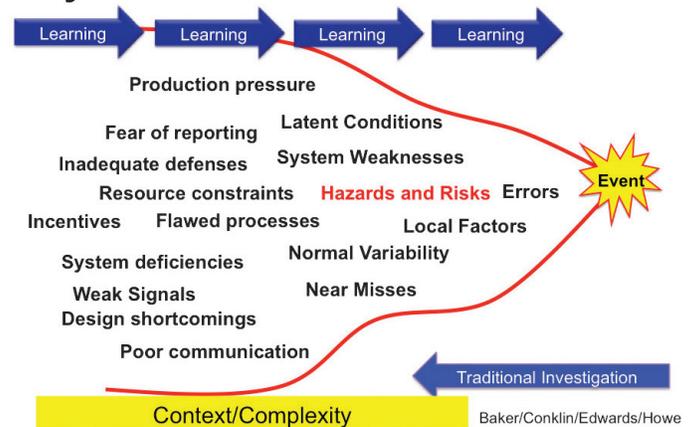
Understanding an event begins with understand the context which is often complex.

> **"**
> ## "My goal, as a coach, is to learn enough that I realize, given the conditions they faced and the information they had, I would probably have made the same decision."
> Bob Edwards, HOP Coach

When we believe we know the answer . . .
. . . we stop asking questions
. . . we stop listening
. . . we stop learning!

Session 2 Review and Problem Solving
Review Session 1 wall of discovery (charts)

>> What else did you think of since we last met?
>> Can anyone think of anything else that we should include?

Sample questions for the Session 2
>> Tell me about what has been working well.
>> What needs to be done to improve the job?
>> What do you guys want to do differently?
>> What do you want to do to make it better and safer?
>> When should we follow up to make sure things are
   getting done and working better?
>> How can we set up small experiments or prototypes
   to try some of our solutions?
>> How can we tell the story? Who should we tell it to?
>> How will we track progress on making improvements?
Actions – Session 2
>> Prioritize improvement items
>> Develop action/implementation plans
>> Communicate learnings and process improvement

Learning Team Closure Criteria
Continue the effort with the learning team until the team
has implemented sufficient levels of defenses to satisfy:
→→ The Learning Team
→→ The affected employees
→→ Management and worker representative
 ...AND...We have communicated our story.

How do we measure the effectiveness?
Often the results speak for themselves.
You may also consider:
>> The organization's response to failure and incidents.
>> The number of requests for learning teams.
>> Requests for learning teams outside health and safety.
>> The willingness of employees to participate on
   learning teams.
>> The output of learning teams.
>> The number of employees volunteering to
   participate on learning teams.
>> The level of success of areas outside of safety
   such as production and quality initiating
   learning teams.

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Goal of Learning Teams

The purpose of learning teams is to understand complexity and the dynamic trade-offs and goal conflicts that are inherent in all work and organizational processes and systems. This is accomplished by focusing on work-as-performed as opposed to work-as-imagined at all levels of the organization.

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