



Electrical Transmission & Distribution Partnership

Continuing Education Training

-Walk the Talk

Demonstrating Credible Leadership

Presenter
Guide

-3rd Quarter 2020

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Introduction

The Walk the Talk continuing education course is a presenter led process. The presenter may choose to augment the material with videos, handouts or other media to enhance the learning experience. The facilitator may want to incorporate visual aids to enhance the presentation.

Using this material combined with practical experience, good presentation skills, and knowledge of adult learning techniques, the presenter has a greater opportunity to deliver the information effectively.

Microsoft® PowerPoint® combined with good instructional skills and instructor/student dialogue help with information retention and understanding. PowerPoint® presents the information to the attendee and the facilitator summarizes the content of the slides. It is critical to engage and involve the attendee in the process. Ask open-ended questions that will elicit conversation and discussion but be cautious to maintain control of the discussion.

Conversation and scenarios are good but can cause the discussion to run long. If it seems like the group is losing focus during the course, the presenter can direct the group back on track by using comments like “This is a great discussion, but let’s get back to the subject at hand”.

Another tool is the “Parking Lot” which a newsprint chart, dry erase board, or note pad where the presenter records unanswered questions or concerns during the meeting and that may require more research or an off-line discussion. It is vital to capture any ongoing discussions or questions on the “Parking Lot” and follow up when the information is known.

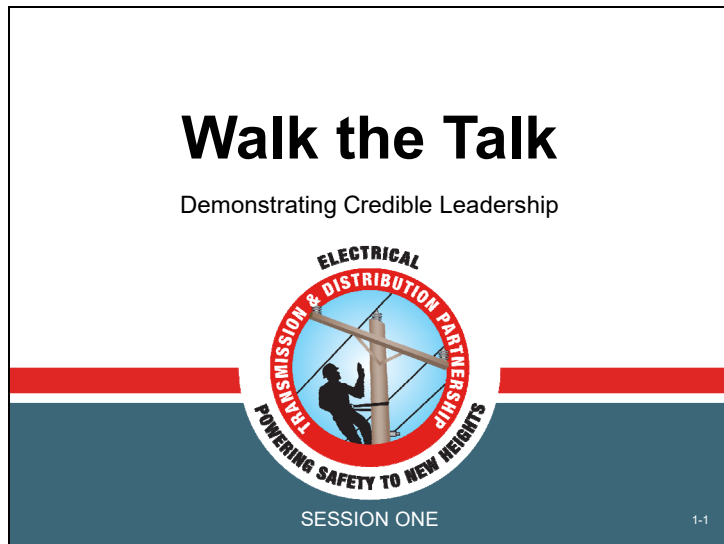
Deliver this continuing education module in the third quarter of 2020. Delivery time is approximately 1 to 1.5 hours in one setting, or divided-up into three, twenty to thirty-minute settings. There is text animation on most of the slides. Text will appear by varying levels on mouse clicks. It is critical that the facilitator makes him or herself familiar with the material prior to delivery.

Included in this training is a handout on basic human performance tools. The presenter (at their discretion) may use the handout to augment this training.

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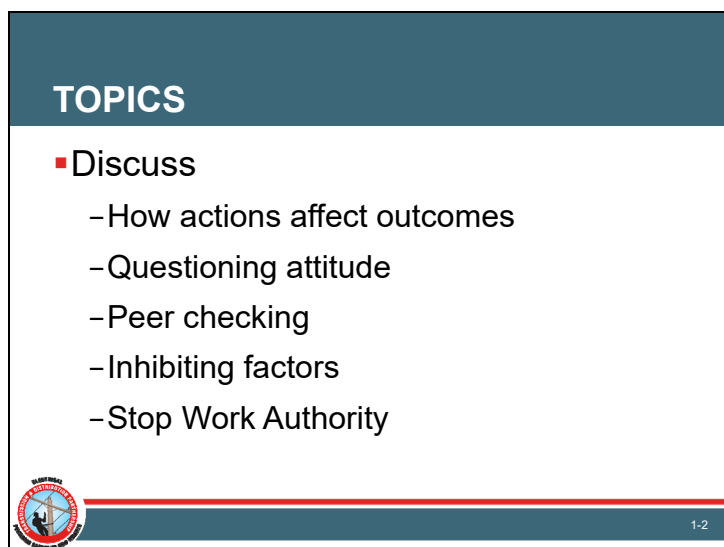
Start session 1

Slide 1-1



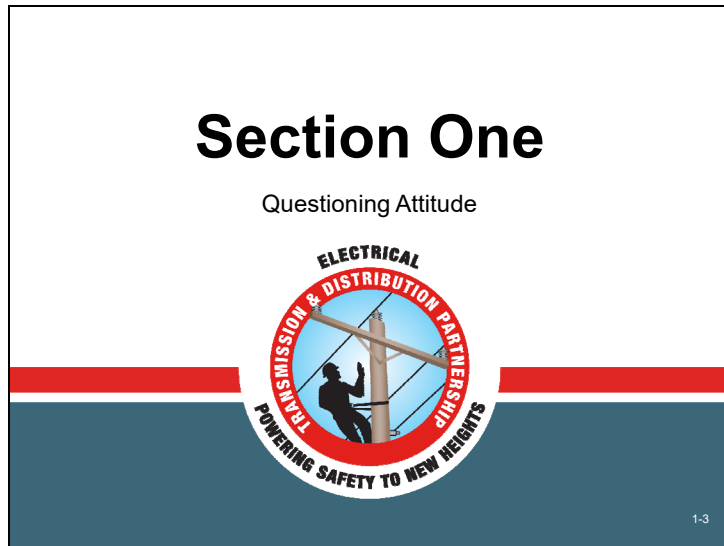
Introduce the module. Explain that this module is part of the OSHA Partnership's continuing education process.

Slide 1-2



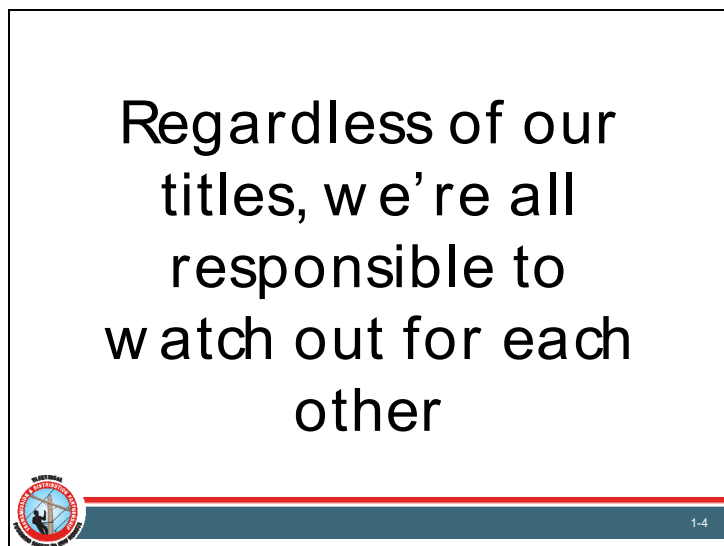
Explain the topics of discussion. Explain why this topic was selected and what the attendee can expect to learn. Ask the group what they believe credible leadership means to them. Ask the group how they feel a leader can demonstrate credible leadership and how they themselves may do the same.

Slide 1-3



State that the following section will discuss the human performance tool known as Questioning Attitude. Ask the group if anyone has heard of the “questioning attitude” tool?

Slide 1-4



This statement is self-explanatory. We need to watch out for each other. That way we are each other's back-up. Explain that together we can be better and safer.

Slide 1-5

SCENARIO

- Two-person URD terminating crew, Foreman & Apprentice
- Thursday afternoon
- Job:
 - terminate new cable run and retire old existing cable
- New cable terminated and energized
- Old cable was de-energized and placed in a parking bushing
- Work day ends



1-5

Explain that the following slides will discuss a situation where two workers were injured. Explain that at the end of the scenario you will ask the group questions regarding this incident. Read the scenario.

Slide 1-6

SCENARIO

- Monday Morning
- Job (continued):
 - retire and remove old existing cable
- Apprentice instructed to cut-off cable elbow with ratchet cutters
- There was an arc flash and explosion
- Apprentice 2nd degree burns to face
- Foreman 2nd degree burns to forearm and hand



1-6

Read the narrative. Be sure to emphasize the fact that the crew has been away from the job since the previous Thursday.

CIRCUMSTANCES

- Work began Monday morning without an adequate tailboard meeting
- Foreman had a court appearance prior to beginning work on Monday morning
- No flash shield worn by apprentice

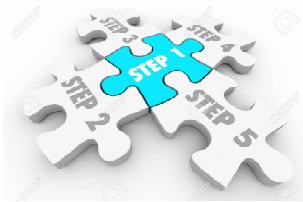


1-7

Emphasize that the job did not start first thing Monday morning because of the court appearance of the foreman. State that face shields (and other PPE) is required by their client and their company but were not worn.

FACTS

- Old cable was not tested for absence of potential
- Old cable was not parked in a grounding bushing
- Foreman was not wearing adequate PPE
- Job started later than normal
- The correct procedure existed and was known



1-8

State that the cable was not tested and verified and because of this, should have been considered as an energized conductor. The apprentice cut the wrong cable and was directed to cut the cable by the foreman. The foreman may have been distracted and the foreman was not wearing proper PPE.

DISCUSSION

- What was missed?
- What should have happened?
- What were the extenuating circumstances?
- What controls, if used, would have made a difference?
- Were the selected controls enough?



1-9

Ask these questions. The purpose is to generate discussion and promote critical thinking. Be sure to place the discussion in the context of human performance concepts.

When discussing the “what was missed” portion, listed below are some desired responses.

- The correct procedure existed and was known but not followed
- There was an absence of leadership and a questioning attitude.

PERFORMANCE

Behavior + Results = Performance

- Behaviors are what we say and do
- Results are Outcomes (good or bad)



1-10

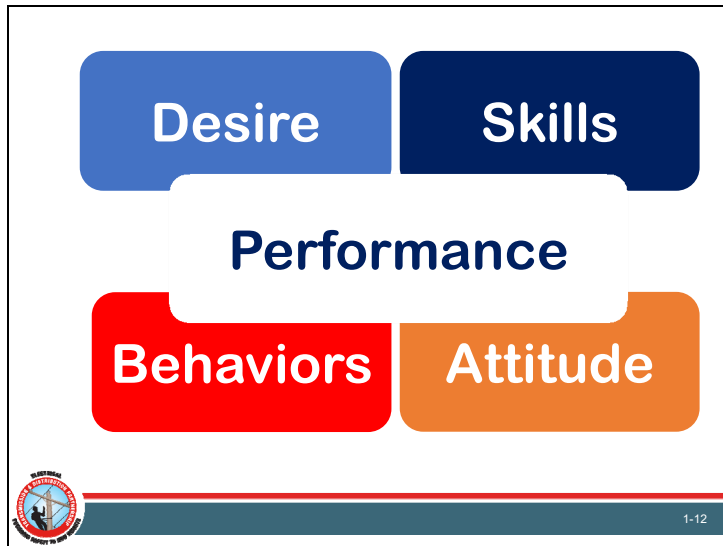
Explain that excellent human performance is achieved by continuously reinforcing correct behaviors. This leads to optimum personnel safety and system reliability. Remember that people will make mistakes.

Due to this fact, it makes more sense to have layers of controls in place. Remember it's not "if" but "when" the failure occurs are there layers of protection in place? These layers of protection are what helps enable capacity and resilience.

Slide 1-11



Explain that these two images are targets. The dots represent shot fired at the targets. Ask the attendees: based on what you see, which shooter did the best?" Then trigger the animation which will bring up the scoring metric and ask the same question again. Point out that what is "best" depends on what is being measured. One key aspect here is to explain that we should measure what is important to our organizations. We must state what we expect and then measure performance. This is what "Behavior + Results = Performance" means. The behavior aspect is clearly stating what is expected. The results aspect is stating what is to be measured and either measuring points or spacing. Once the expectation is clear, then the performance should be our originally stated desired outcome.



Explain that understanding personality types can help identify the causes of conflict. Understanding these differences can help individuals and teams to understand each other. The result can be less conflict and greater harmony in the workplace. People that practice these skills can help navigate through the maze of conflict by:

- Helping raise awareness of conflict and solutions
- Supporting supervisors to build a framework of their style
- Helping teams and individuals to understand different personality types and raising awareness of the benefits of difference
- Offer mediation where any conflicts have become formal
- Help organizations to have effective policies and processes to deal with conflict in a timely and effective way
- Help Managers to understand their legislative obligations
- Understanding conflict resolution styles and personality types, organizations are well equipped to pivot conflict to create a healthy culture of airing differences.

WHAT IS QUESTIONING ATTITUDE?

- A Human Performance Tool
 - Fosters thought about safety before action is taken
 - Helps maintain an accurate understanding of the work conditions
 - Helps overcome the temptation to rationalize away “gut feelings”
 - Promotes a preference for FACTS over assumptions and opinions



1-13

Explain that a questioning attitude is a value-based, systematic, and a repeated use of inquiry as a means to promote valued outcomes of behaviors. It can help people prevent errors and foster awareness of uncertainty, assumptions, risk factors, and the significance of decisions or actions. A strong questioning attitude should reflect an interest in representing problems, purposive seeking of questions and answers, recognition of the importance of questioning, and awareness of the risks associated with complexity, complacency, and uncertainty.

WHEN TO USE IT?

- Before performing critical steps
- When experiencing uncertainty or doubt
- When experiencing a “gut feeling”
- After encountering unexpected results



1-14

Explain that prior to performing critical tasks we should take a second, pause, and be certain that we have proper controls in place. Whenever we are experiencing uncertainty or doubt, after encountering unexpected results, and/or if we get that “gut feeling” that something may not be correct.

WHEN TO USE IT?

- Upon hearing the DANGER WORDS:
 - "I **Assume** this is the correct way"
 - "We should **Probably** do it this way"
 - "I **Think** this is the correct way"
 - "**Maybe** they wanted it done like this"
 - "That **Should** be right"



If you hear these words or phrases, the Red Flag should go up



1-15

Slide has animation.

Explain that we must look out for weak signals or what is commonly referred to as "Danger Words". Danger words to be aware of are "I **Assume** this is the correct way", "We should **Probably** do it this way", "I **Think** this is the correct way", "**Maybe** they wanted it done like this", "That **Should** be right"

WHY USE IT?

To validate conditions when things are different than expected

- To challenge pre-conceptions
- To stimulate thought
- To prevent rationalization



1-16

Explain that some reasons for using a questioning attitude are to validate conditions when things are different than expected, to challenge pre-conceptions and assumptions, to stimulate healthy thought regarding processes and procedural steps, and/or to prevent rationalization for proceeding when things "Don't Seem Right"

KEY POINTS-SESSION ONE

1. A “Questioning Attitude” is a human performance tool.

☒ a. True

b. False

2. Behavior + Performance =

a. Confusion

b. Attitude

☒ c. Results

d. Resistance

3. We should use a “Questioning Attitude” before starting any critical task.

☒ a. True

b. False



1-17

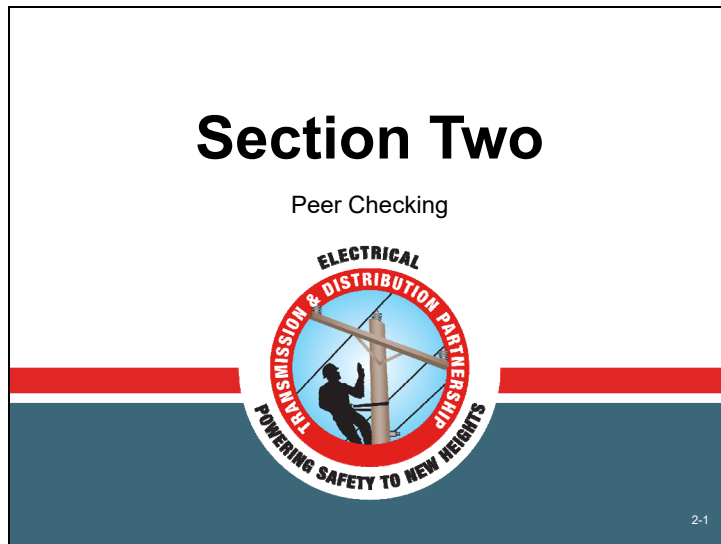
The presenter should have touched on the following items when explaining session one:

- A “Questioning Attitude” is a human performance tool.
 - True
 - False
- Behavior + Performance =
 - Confusion
 - Attitude
 - Results
 - Resistance
- We should use a “Questioning Attitude” before starting any critical task.
 - True
 - False

End of session 1.

Begin session 2.

Slide 2-1



Explain that Peer-checking (PC) is a series of actions by two individuals working together at the same time and place, before and during a specific action, to prevent an error by the performer. By my definition, a “peer” is someone you trust who is familiar with the task you're asking them to check you on.

Slide 2-2

WHAT IS PEER CHECK?

A series of actions by two individuals working together at the same time and place

- To prevent an error



2-2

Explain that the purpose of PC is to prevent an error by the performer. Error prevention is the principal function of the peer check technique. Peer check augments self-checking by the performer—it does not replace it. Peer check involves two people (performer and peer) self-checking in parallel, agreeing together that the action is the correct action to perform on the correct component. The peer, an individual familiar with the activity, may see hazards the performer does not see.

Slide 2-3



Explain that, a “peer” is someone you trust, who is familiar with the task you are asking them to check you on. This technique takes advantage of a fresh set of eyes not trapped by the performer’s task focused mind-set. The peer may “see” hazards or potential consequences the performer does not see.

Slide 2-4



Slide has animation.

Humorous slide. Trigger the animation.

BOTTOM LINE

It's not about right or wrong

- It is about doing the task in the safest way
- If something doesn't feel right, speak up



2-6

Explain the key points. It's not about who's right or wrong. The entire point is to determine if we are doing the task in the safest way. Explain that if something doesn't feel right, speak up and try to understand. If understanding cannot be gleaned, and the risk seems unnecessary, then the work must stop.

GIVE AND TAKE

If you see something that concerns you

- Speak Up!
 - Try to understand
 - Why is it being done this way?
- Speaking-up may save a life



2-7

Explain that the reason we want to foster a workplace where workers not only feel comfortable with speaking up but that they feel obligated to speak up when the need to understand why we are doing the task the way we are doing it. Remember, Speaking-up may save a life.

GIVE AND TAKE

When someone gives you safety feedback

- Listen Up!
 - They are doing so because the Care!



2-8

Explain that if someone is providing safety feedback, they are saying that they are concerned about what they are seeing, what we are doing, or both. If it is about safety, we need to put our hurt feelings aside and listen up. It's about caring and looking out for each other. Again, listening-up may save a life.

FEEDBACK

If someone takes time to offer constructive feedback:

- Focus on the message
- Thank them for speaking up
- It's about caring
- Involvement is good but commitment is Great!



2-9

Explain that if someone takes the time to peer coach you and/or other members of the crew, thank them for speaking up. Remember, it's not about being critical, it's about caring. Recognize safe behaviors, like good peer coaching, in a positive way

Slide 2-10



Explain that you are going to discuss the difference between involvement and commitment. Ask the group "is there a difference between involvement and commitment" and if they say "Yes" then ask what they believe the difference may be between involvement and commitment? Next, ask the group; "In the context of safety, which is more vital, involvement or commitment?" The answer you can expect is "both!" This is a true answer but ask the group to choose of the two, which is most important?

Slide 2-11



Humorous slide to illustrate the difference.



State that making a commitment involves dedicating yourself to something, like a person or a cause. Before you make a commitment, think carefully. A commitment obligates you to do something. Commit to working safely and to influence others to do the same

KEY POINTS-SESSION TWO

1. Peer checking is a series of actions by two individuals working together at the same time and place to prevent error.

☒ a. True

b. False

2. If you see an unsafe act or condition you should:

a. Take a picture with your phone

b. Call OSHA

☒ c. Speak up

d. Run for cover

3. The purpose of peer checking to help prevent error.

☒ a. True

b. False



2-13

The presenter should have touched on the following items when Explaining session one:

- Peer checking is a series of actions by two individuals working together at the same time and place.

- True
- False

- If you see an unsafe act or condition you should:

- Take a picture with your phone
- Call OSHA
- Speak up
- Run for cover

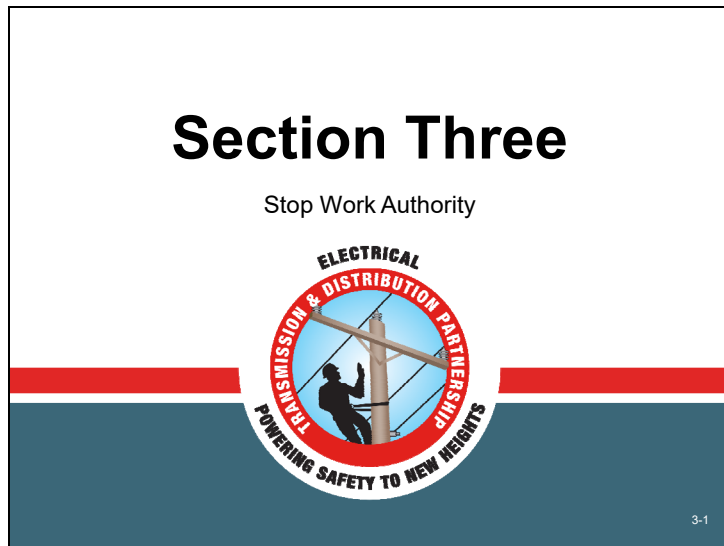
- The purpose of peer checking to help prevent error.

- True
- False

End of session 2.

Start session 3.

Slide 3-1



State that Stop Work Authority (SWA) is a program designed to provide workers with the responsibility and obligation to stop work when a perceived unsafe condition or behavior may result in an unwanted event.

Stop Work Authority Roles and Responsibilities

A Stop Work Authoring program must clearly define the roles and responsibilities. Examples of roles and responsibilities are:

- **Senior Management:** Creates a culture that promotes SWA, establishes clear expectations and responsibilities. Demonstrates support for using SWA without the potential for retribution. Resolves SWA conflicts when they arise. Holds employees and contractors accountable for full compliance with the SWA program.
- **Supervisors and Managers:** Promotes a culture where SWA is freely exercised, SWA requests are honored and resolved before resuming operations. Ensures necessary stop work follow-up is completed.
- **Health Safety & Environmental (HSE) Department:** Provides training, support, documentation and monitors compliance of the SWA program. **Company employees and contractors:** Initiate stop work (in good faith) and support stop work initiated by others.

“People do not operate in a vacuum, where they can decide and act all-powerfully. To err or not to err is not a choice. Instead, people’s work is subject to and constrained by multiple factors”

— Sidney Dekker



3-2

FYI: Sidney W. A. Dekker, is a Professor at Griffith University in Brisbane, Australia, where he founded the Safety Science Innovation Lab. He is also Honorary Professor of Psychology at the University of Queensland.

Situations that may Require a Stop Work Action

Stop Work Authority should be initiated for conditions or behaviors that threaten danger or imminent danger to person(s), equipment or the environment. Situations that warrant a SWA may include, but are not limited to the following:

- Alarms
- Change in conditions
- Changes to scope of work or work plan
- An emergency
- Equipment used improperly
- Lack of knowledge, understanding or information
- Near-miss incident
- Unsafe conditions

STOP WORK-6 SIMPLE STEPS

1. Stop
2. Notify
3. Investigate
4. Correct
5. Resume Work
6. Follow Up



3-3

State that you are going to discuss the six steps in the Stop Work Authority process. Explain that Stop Work Authority is a several step process. The six basic steps are: stop, notify, investigate, correct, resume and follow-up (training on lessons learned etc.)

1. STOP

Conditions indicate that there is may be a serious and/or imminent danger

- Coordinate with supervisor (if available)
- Must clearly identify the need and the intent
- Must be a collaborative effort
- Not combative



3-4

State that when someone, anyone perceives condition(s) or behavior(s) that pose imminent danger to person(s), equipment or environment he or she must immediately initiate a stop work intervention with the person(s) potentially at risk. That person becomes the Stop Work Initiator (SWI). If the supervisor is readily available and the affected person(s), equipment or environment is not in imminent danger, coordinate the stop work action through the supervisor. The Stop Work Action (SWA) should be clearly identified and initiated in a non-combative manner. Avoid the “Got You” or “Caught You” mind set.

2. NOTIFY

Whom?

- Affected worker(s)
- Supervision

What?

- Why stop work is deemed necessary
- Make the area as safe as possible
- If needed, remove affected personnel



3-5

State the need to notify affected personnel and supervision of the Stop Work Action (SWA). If necessary, stop work activities that are associated with the work area in question. Make the area(s) as safe as possible by removing personnel and stabilizing the situation. Consider documenting the Stop Work issue on the job briefing form.

3. INVESTIGATE

Seek Understanding

- Why is the task being done that way?
- Is there no safer way?
- Is the "Stop Work" initiator missing key information?

Seek Consensus

- Come to agreement of a safer way



3-6

Affected personnel will discuss the situation and come to an agreement on the stop work action. If all parties come to an agreement that the condition or behavior is safe to proceed without modifications, (e.g. the initiator was unaware of certain information or circumstances), the affected persons should show appreciation to the SWA initiator for their concern and then resume work. The SWA is complete at this point and no further steps are needed. The condition(s) or behavior(s) that pose threats or imminent danger to person(s), equipment or the environment must be resolved before restarting work.

4. CORRECT

Modify

- Change or modify the steps
- Find a safer way

Seek Consensus

- Make sure everyone involved is "on-board"





3-7

Modifications to the affected area(s) will be made according to the decided upon corrections. The affected area(s) will then be inspected by qualified persons to verify completeness of the modifications and to verify all safety issues have been properly resolved. The completion of modifications should be noted on the job briefing form.

5. RESUME

Restart

- Person(s) with restart authority
- All affected parties notified
- Corrective action(s) communicated

If any workers still do not feel safe to proceed

- Reassign
- No retribution





3-8

Explain that the affected area(s) will be reopened for work by authorized personnel with restart authority. All affected workers are notified of the corrective actions and that work will recommence. In the event a worker or workers believes it is unsafe, they will be assigned to another job with absolutely no retribution.

6. FOLLOW UP

Root Cause

- Why was work stopped?
- What are the corrective actions
- What was learned?
- Is follow up required?

Communicate

- Corrective action(s)
- If follow up
 - What?




3-9

Operations (supervision) should perform a root cause analysis of the work that was stopped and identify any potential opportunities for learning and improvement. Operations and Safety should communicate the details regarding the stop work action to all appropriate employees outlining the issue, corrective action and lessons learned. Management will promptly review all stop work reports in order to identify any additional investigation or required follow-up. Depending on your company and reporting structure your specific procedure may vary.

CONFLICT RESOLUTION

Must have a defined process

- Should be expected
- All opinions are noted
- Defined protocol

Involve all parties

- Persons with authority
- Senior management
- HSE management




3-10

Stop Work Authority Conflict Resolution. Most organizations experience conflict at some time. Conflict can arise within teams or with individual colleagues. Disputes resolved in the right way is a healthy part of working with others. Professional expertise is essential if an organization has a culture of conflict.

An organization adopting good conflict resolution management can be a purposeful way to highlight and solve problems in the workplace. Precious time, energy and wasted costs can be saved if the conflict can be resolved quickly and effectively.

The dynamics of conflict resolution.

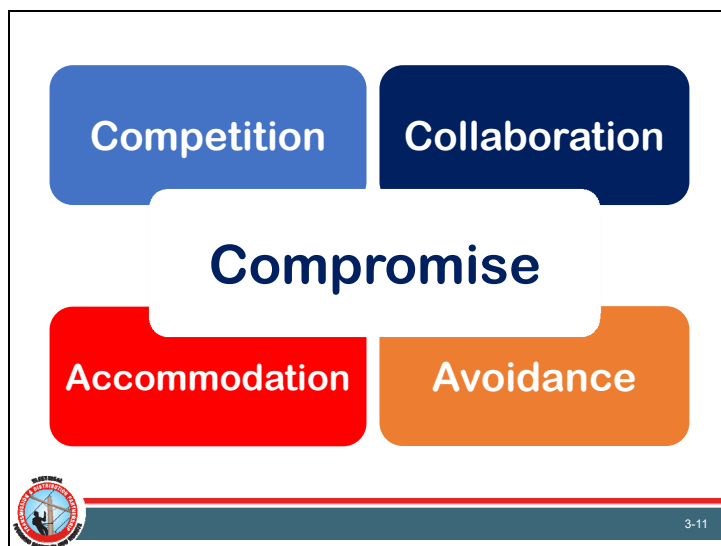
When considering the components of conflict resolution, there are two dynamics to consider. The first is about conflict resolution styles. The second is around differences in personality type. If we aren't sure how people tick, then personality clashes can get in the way of effective conflict resolution.

It is important to have a defined process for conflict resolution in case opinions differ regarding the validity of a stop work action, corrective actions or the decision to resume work. All opinions should be noted; however, a clearly defined protocol must be included in the Stop Work Authority Program to provide prompt conflict resolution. Persons with proper authority to make the final determination may include senior management and HSE managers who are not associated with the conflict.

Training

The importance of initial and ongoing training should not be underestimated. Implementing a Stop Work Authority Program that is understood by all personnel is paramount to ensuring success.

Slide 3-11



Explain that understanding personality types can help identify the causes of conflict. Myers-Briggs personality type instrument (MBTI) is a powerful and effective tool which can be used to identify those differences. MBTI can help individuals and teams to understand differences, by helping people understand how they themselves and others, operate. The result can be less conflict and greater harmony in the workplace.

KEY POINTS-SESSION THREE

1. Stop Work Authority (SWA) is a program designed to provide workers with the responsibility and obligation to stop work when a perceived unsafe condition or behavior may result in an unwanted event.

☒ a. True

☐ b. False

2. One important aspect of Stop Work Authority is:

☐ a. Catch people screwing up

☐ b. Avoid law suites

☒ c. Learning

☐ d. Showing people who's boss

3. Conflict can arise within teams or with individual colleagues.

☒ a. True

☐ b. False



3-12

The presenter should have touched on the following items when Explaining session one:

- Stop Work Authority (SWA) is a program designed to provide workers with the responsibility and obligation to stop work when a perceived unsafe condition or behavior may result in an unwanted event.
 - True
 - False
- One of the most important aspects of Stop Work Authority is:
 - Catching people screwing up
 - Avoiding law suites
 - Learning
 - Showing people who's boss
- Conflict can arise within teams or with individual colleagues.
 - True
 - False

Slide 3-13



Slide 3-14



End of module.