EFCOG HPI Community of Practice Monthly Conference Call

April 27, 2023

Meeting started at 11:02: CDT.

Participants:

- Mike Petrowski (LANL)
- Ken Madson (LANL)
- Tamara Shokes (INL)
- Ben Troshynski (INL)
- David Boyce (INL)
- Fred Gholson (INL)
- Jeff Warga (LLNL)
- Christine Kerr (LLNL)
- Gale Voyles (Bechtel)
- Susan Blackburn (ORNL)
- Valeri Webb Kline (SNL)
- Ben Close (SNL)
- Wayne Manor (SRNS)
- Andy Hobbs (Y-12)
- Kim Leffew (CNS)
- Sue Baumann (ANL)
- Shalaine Britain (WIPP)
- Jonathan Martelon (WIPP)
- Deborah Millerr (FNL)
- Nancy Van Wermeskerken (PPPL)
- Angela McGill (ORCC)
- James Newman (LBNL)

1)   Task Team Business

   a)   Review/Update Tasks and initiatives
   1. 2023 Activity – Support DOE Rizwan Shah with the revision of HPI DOE-HDBK-2009-1028
   b)   Challenges – none
   c)   Other updates –
   1. New Team members
      i.   Wayne Maynor

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ii. Amanda Jimenez

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Human Performance		
Activity(s) **ISM-HPI-23-01**	**Benefit(s)**	**Deliverable/Key Milestone(s)**
Support EHSS-20 revision of DOE-HDBK-1028-2009, Human Performance Improvement Handbook	Human Performance Tools for Individuals, Work Teams, and Management were written in June 2009. They have become the core reference documents for many users both within and outside the DOE complex. These updates will help expand the scope of the Department's HPI programs by encompassing Human and Organizational Performance (HOP) This effort will result in significant revisions to the Handbooks, with an estimated twenty-five percent change to Volume 1 and a fifty percent change to Volume 2. The content and the approach to the topics will be based on concepts and practices found helpful in the commercial nuclear power industry, electrical grid and distribution, national laboratories, and those adopted by other sectors.	The EFCOG HPI Task Team will collaborate with EHSS-20 to select EFCOG team members. EHSS-20 will identify the specific updates that will be made by the team revising the Handbooks. The team will be composed of a Federal Project Lead with academic and technical experts. Team members will include subject-matter experts from DOE M&O contractors and thought leaders from outside the DOE complex.

Human Performance		
Activity(s) **ISM-HPI-23-01**	**Benefit(s)**	**Deliverable/Key Milestone(s)**

Status Update:

- Working meeting at HPAC conference (4/20) – Worked on a definition and description for HOP (Human and Organizational Performance)
- Send your specific content edits to Kalen Ortiz (kalen.ortiz@hq.doe.gov) as indicated below. Please do not make suggestions about books that Kalen can read, good articles or presentations that information can be gleaned from, etc. Kalen is a technical writer with no HPI background or experience. Therefore, use track changes on a word document and submit that document.
- Notes from Kalen Ortiz:
  - Meeting Schedule Reminder: we will not be meeting on April 19th. Our next Virtual meeting will be on May 3rd, 12:30-1:30pm, EST.
  - SharePoint housekeeping: The SharePoint site is read only. Please download word files to your machine for editing and comments, and then email me that file with your full name in the file name: HPI_Vol_1_1chapter_Kalen_Ortiz.docx.
  - If you are interested in volunteering to lead the discussions around specific chapters during our re-write of the handbooks, please send Riz and myself an email telling us what chapter you'd like to lead on, as we will be assigning teams and selecting team leads this month.
  - So far, Daryl Smoldt has offered to lead for Vol 2, Chapter 1, and Elizabeth Lay has offered to lead for Vol 1, Chapter 5.
  - Thank you all for your contributions!

    Kalen Ortiz
    Project Enhancement Corporation
    Research Analyst
    Email: kortiz@projectenhancement.com

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d) **Upcoming Meetings and Conferences (EFCOG and other HPI meetings)**

- o EFCOG Spring QA/ISM/CAS Joint Virtual Meeting
    - ▪ https://efcog.org/event/qa-ism-cas-spring-2023-meeting/
    - ▪ Registration
    - ▪ Agenda:
    - ▪ Monday May 1: Joint QA/ISM/CAS Session
    - ▪ May 2-4: Breakout sessions
    - ▪ <mark>HPI CoP Breakout session:</mark> Thursday 5/4, 10:30 – 4:30 EDT
- o Community of Human and Organizational Learning (CHOL)
    - ▪ Leveling Up: Success through Learning
        - • Renaissance Portsmouth-Norfolk Waterfront Hotel in Portsmouth, VA
        - • Conference: Tuesday, June 13th thru Thursday, June 15th
          Workshops: Monday June 12th and Friday, June 16th
    - ▪ https://www.cholearning.org/
    - ▪ Conference Mailing List (https://www.cholearning.org/professional-development)
- o EFCOG Annual Meeting
    - ▪ June 21-22, 2023
    - ▪ Hilton Washington D.C. National Mall the Wharf 480 L'Enfant Plaza SW, Washington, D.C.

e) **Webinars: still the same**

- o EUCI - Human Performance Community of Practice
    - ▪ https://www.resilientgrid.com/hpcop
    - ▪ Hosted by KnowledgeVine
    - ▪ Every other Thursday 4PM EST
    - ▪ HP Community of Practice discussions will continue to take place every other Thursday and are free for the HP community to participate. There will be a presentation and discussion by a few select hosts, followed by a question and answer/discussion period for all. We will follow up on the session with a virtual Happy Hour.
    - ▪ To join: https://mailchi.mp/e4274b7f9e84/hpcop
    - ▪ HumanPerformanceCOP@gmail.com
    - ▪ Past Presentations: https://www.resilientgrid.com/hpcop-3

- o CHOL - Community of Human and Organizational Learning
    - ▪ Formerly HPRCT

- https://www.cholearning.org/
- https://hprct.org redirects you to the new webpage
- Monthly Webinars:
  - https://www.cholearning.org/professional-development
- News and Blogs:
  - https://www.cholearning.org/news
- Video Library:
  - https://www.youtube.com/channel/UCRbkD3m2ro7kCK-uF1X772A

2) HPI Share:

David Boyce: INL discussion about loss of skills and abilities due to over-reliance on technology

David discussed the growth of technology and how it is impacting our lives and behaviors. David provides several examples, such as GPS, and how it was new at one time – we didn't know how to use it and it wasn't very dependable. Now GPS is commonplace, and we are very dependent on it. Other examples included back-up cameras, cell phones, etc.

Comments included:

- Andy Hobbs: Talked more about performance modes. As Earl used to say, 'All models are wrong. Some are useful.' Rasmussen's model of Performance Modes is useful for describing the different ways in which humans control their behavior when using technologies. When you first experience the technology, you're in KB and then progress more to RB and SB as you (your senses) get familiar with the technology. After you have sufficiently mastered the task, your actions will be more controlled automatically (skill-based mode), but you are always 'jumping' into rule-based mode as your senses scan and search for inputs that may prompt you to stop or change/alter your actions. The modes 'exist' simultaneously. You are never only in one mode. The more that a task, such as troubleshooting, entails basing subsequent actions on feedback from the system, the more rule-based and knowledge-based jumps will be involved. But physical actions will still mostly be automatic once a rule or basis for action has been determined.
- Jeff Warga: Shane Bush training course – If an individual believes they are in SB but are actually in RB/KB we should be alert for that.
- Mike Petrowski: Discussed how humans have permitted technology to take over tasks for them. When it fails, we are no longer proficient at that task. For example, phone numbers. We previously remembered numerous phone numbers, now we are dependent on cell phone contact lists.
- Fred Gholson: Shared conducting an HPI introductory course. Touched on aspects of a resilient organization. Being able being able to identify what was supposed to happen and compare that to what happened. Talked about people becoming dependent on technology, it is impacting our ability to be a resilient organization.

3)   Round Table

- Human Performance in Action Conference (HPAC)
  - Participant share
    - Mike Petrowski (LANL)
      - HU=W(B+R) Human Performance = Why we do (What we do + How we do it)
      - Jake Mazulewicz gave a great presentation on "The Business Case for a Learning Based Approach to Errors"
      - It is important to follow-up on the HPI training conducted. Did it have an impact?
      - One breakout session was a Lewis Tree company Case Study on the 2022 Buffalo blizzard. Workers were staged in the field, the blizzard was worse than expected, cell phones were not available, people need to adapt and make survival decisions.
      - Some quotes:
        - "If you think you are leading, and no one is following you; you're on a walk. You need to turn around and go get them."
        - "Machines deal with data, people deal with information, executives deal with stories."
    - Wayne Maynor (SRNS)
      - Take-Aways include learnings from observations vs interactions (engage when you see something and correct it on the spot, is more effective that documenting what you saw. IT develops relationships
    - Bill Burrell (SRNS)
    - Jason Strickland (SRNS)
    - Lauri Minton (PANTEX)
    - Suellen Cook (ANL)
    - Riz Shah (DOE-HQ)
    - Kalen Ortiz (DOE-HQ)

- EFCOG HPI CoP Roundtable

LANL: Mike Petrowski
- o Hired a second HPI dedicated staff position.
- o Having HPI Posters created with LANL branding.
- o Starting to see special requests for Group specific HPI Training. Ethics staff, Weapons Facility, Weapons New Employee Training, Chemistry, etc.

LANL: Ken Madson

- o Ken is new to the team
- o HPI is a language that you're looking for when focusing on safety. Excited to join to the community.

Y-12: Andy Hobbs
- o Provided an update on the revision of DOE Causal Analysis Standard. They are trying to figure out the structure based on the revision/addition proposed by Andy. At first it was suggested that new items be added, and the old codes are "retired" for the A3 tree. This will retain the data associated with the retired codes, along with mapping to the new codes. Another addition is definitions of the new codes and assistance with conducting analytics down to the "B" level. Decided to eliminate "C" level analysis. Expecting to be completed prior to HPI Handbook revision but will wait until HPI DOHDBK is completed so they can be released concurrently.

LLNL: Jeff Warga
- o Week of getting back into the fundamentals of HPI thru Shane Bush training. Shane has been the cornerstone of our training at LLNL. It was nice to learn some more from Shane. Helps me communicate the message if HPI. Particularly the Resiliency Scale. It is very applicable to our mission. Is it a critical risk important step and how can we reduce the unwanted consequences.
- o With the whole changeout of our workforce, we realize it would be good to have new people go thru this training
- o Still working on Conduct of Operations

SRNS: Wayne Manor
- o Nothing new from SRNS
- o Appreciate help from those I reached out to

INL: David Boyce
- o INL is working on – looking at our fundamental course and chunking it to shorten the sessions. This way people who do not have the time for the entire class, they can do modules on their schedules. Video takes short sessions. Have half of the fundamentals class completed and are getting ready to make these available
- o Looking at proactive learning teams and other types of learning methods to proactively learn

- Injury reports – evaluate incident report and to see if there is some tidbit of information we can follow up on. We are finding things that are helpful
- White paper on coaching – HPI Coaching course is being revised and want to include elements from the white paper. Survey found that people are interested in coaching. Focusing more specifically on what people can do now. For example, following up on coaching interactions.

INL: Tamara Shokes
- Started the PM seminars. David Boyce presented on habits. We're going to be doing hourly seminars each month that can include HPI and other topics.

INL: Fred Gholson
- Recently contacted Charles Major, Asked/proposed getting the conference a portion that is virtual. I can provide more people to attend if there is a virtual version. CHOL does not believe there is a community that desires virtual.

WIPP: Shalaine Britain
- Working on First learning team – got positive feedback on the process. We are continuing our journey.
- Expanded the use of snap circuit and purchasing 2 additional HUPERT trainers.
- Expanding DLAs

WIPP: Jonathan Martelon
- No update

ORCC: Angela McGill
- Still continuing to give HPI training and overview.
- Joined vehicle safety committee. Our company has provided new technology, but I want to introduce HPI into this committee. We have had a few incidents in parking lots, which seem to be distractions.
- Vehicle accident HPI interview.
- Tamara: Negative stressors tend to lead to accidents.

FNL: Deborah Millerr
- No update

SNL: Ben Close
- No update

Closing

Next meeting: May 25, 2023

Meeting concluded   12:12 PM CDT.