

EFCOG HPI Community of Practice Monthly Conference Call

September 26, 2024

Meeting started at HH:MM CST.

Participants:

- Mike Petrowski (LANL)
- Amanda Jimenez (SPA)
- Andre Layson (ICP)
- Andy Hobbs (Y-12)
- Barbara Jesus (LLNL)
- Becca Swaner (INL)
- Ben Close (SNL)
- Carley Burgess (SRS)
- Casey Kearns (SRMC)
- Cheryl McKenzie (SNL)
- Darielle Baustert (PANTEX)
- Darrell LeMastus (WRPS)
- Eric Bowen (PANTEX HFE)
- James Newman (LBNL)
- James Olivarez (PANTEX HFE)
- James Vera (WTCC)
- Jeffrey Warga (LLNL)
- Joe Lockwood (N3B)
- Kyle Bräck (PANTEX)
- Linda Flores (SNL)
- Rich Poliak (SLAC)
- Roby Robinson (Hanford)
- Stacy Lancaster (PANTEX)
- Stefanie Castelli (ANL)
- Susan Blackburn (ORNL)
- Susan Lively (ORNL)
- Tamara Shokes (INL)
- Val Webb Cline (SNL)
- Zachery Gonzales (PANTEX)

1) Community of Practice Business

a) Review/Update Tasks and initiatives.

1. **ISM-HPI-24-01** - Support DOE with the revision of HPI DOE-HDBK-2009-1028
 - i. **Project is in the consolidation phase.**
 - ii. 8/19/2024 email from *Project Enhancement Corporation*

Hello, esteemed HOP rewrite team,

We trust that this message finds you in excellent spirits and enjoying the summer months (what is left 😊)! We wanted to share a brief progress update on the HOP rewrite process. First and foremost, thank you again for sharing your time and insights. Your work is crucial to the success of this project. As we progress throughout the tech editing journey, both Riz and the technical editor dive deeper into the rewrite. The challenge of taking the input of 50+ individual contributors and turning it into a single high-quality handbook is a little more challenging than expected.

Progress continues, but in full transparency, we have pushed the completion of the first draft to approximately January 1, 2025. We want to ensure that quality is the highest planning consideration. The next milestone will involve sharing the product with the rewrite team for final edits.
2. **ISM-HPI-24-02** - Support CAS WG with EFCOG SAFETY SUBGROUP ISM/CAS/QA TASK 3 - Establishing a consistent approach to addressing improvement in operational performance.
 - i. **COMPLETE** – Document is available on EFCOG website – Safety Working Group – Working Group Documents – Contractor Assurance - Documents
 - ii. ([https://efcog.org/wp-content/uploads/Wgs/Safety%20Working%20Group/ Contractor%20Assurance/Documents/Establish%20Consistent%20Approach%20Address%20Improve%20in%20Op%20Perform-FINAL-2024-01-24%20Signed.pdf](https://efcog.org/wp-content/uploads/Wgs/Safety%20Working%20Group/Contractor%20Assurance/Documents/Establish%20Consistent%20Approach%20Address%20Improve%20in%20Op%20Perform-FINAL-2024-01-24%20Signed.pdf))
 - iii. **2024 EFCOG Team Award**
3. **ISM-HPI-24-03** - Support Office of ES&H Reporting & Analysis, EHSS-23, with Revision of DOE-STD-1197-2024, Causal Analysis
 - i. DOE Technical standard has been published.
 - ii. <https://www.standards.doe.gov/standards-documents/1100/1197-astd-2024>
 - iii. The purpose of causal analysis is to identify and to understand all causes (both individual and organizational) that led to an occurrence in order to correct deficiencies and minimize the likelihood of

recurrence. DOE O 232.2A, Occurrence Reporting and Processing of Operations Information, requires the investigation and analysis of occurrences in accordance with local procedures. This technical standard (Standard) can be used to implement the causal analyses necessary in accident investigations, occurrence reports, and Contractor Assurance System (CAS) issues, which are collectively referred to, herein, as incidents. This Standard should be used in conjunction with the corrective action process. Causal analysis of incidents must go beneath the surface to identify how the underlying sources of operational vulnerability combined to produce unintended or undesired results. A causal analysis should explain how failure(s) emerged from a normally stable and reliable system and should also provide the understanding required to improve systems and processes and reduce the risk of future unintended or undesired results.

iv. **2024 EFCOG Team Award**

b) FY25 Tasks and initiatives.

1. **ISM-HPI-25-01** - Support DOE with the revision of HPI DOE-HDBK-YYYY-1028
 - i. Continuation of ISM-HPI-24-01 which did not complete in FY2024
2. **ISM-HPI-25-02:** (White Paper) HPI to HOP transition
 - i. *Start after completion of ISM-HPI-25-01*
 - ii. Identify good reference material on the transition from HPI to HOP
 - iii. Including a clearly written “roadmap” document with a list of actionable steps for companies/organizations who are beginning their journey of integrating HOP concepts and principles
 - iv. Develop a simple set of metrics to measure success with integration of HOP concepts and principles
 - v. Review HPI Task 19-1, Crosswalk of HPI Fundamentals and Tools to DOE Policy Documents, and update as necessary
 - vi. **PARTICIPANTS.**
 1. Cheryl McKenzie (SNL)
 2. Susan Blackburn (ORNL)
 3. James Vera (Bechtel)
3. **ISM-HPI-25-03** (White paper) Investing success: Start exploring ways to investigate record and celebrate success.
 - i. Leverage CHOL presentation by American Airlines.
 - ii. Tamara has Westinghouse experience in this area. Investigate why customer feedback rating scores were high.
 - iii. **PARTICIPANTS.**
 1. James Newman (LBNL)

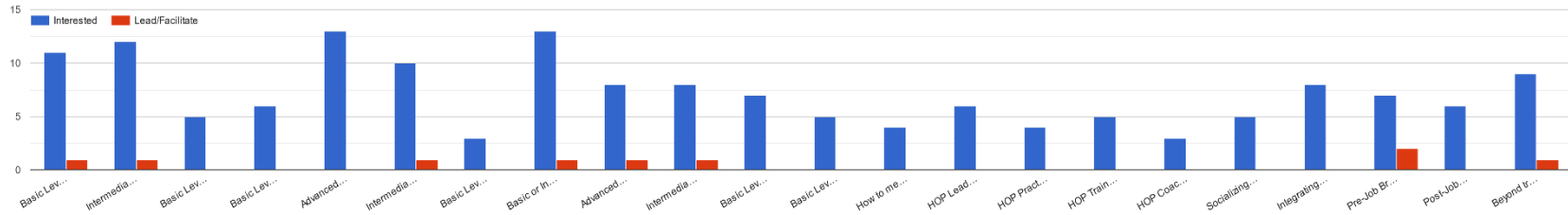
c) Elections

1. Please consider running for EFCOG HPI CoP Chair, Vice-Chair, and Secretary.
 - i. The Chair oversees the day-to-day administration of HPI CoP including planning, guiding, and focusing the activities to ensure EFCOG objectives are met. The EFCOG Chair shall ensure continuity in business during Chair transitions.
 1. Responsibilities include
 - a. Represent HPI CoP at ISM WG meetings
 - b. Represent HPI CoP at SWG meetings
 - c. Submit and track progress of annual plan tasks and initiatives. Report progress to SWG chair
 - d. Schedule and facilitate periodic HPI CoP meetings, including workshops
 - ii. The Vice-Chair (or Co-Chair) Performs the duties of the Chair at the request of the Chair and in the Chair's absence. Should the Chair vacate his or her position for any reason, the Vice Chair will assume the duties of Chair for the remainder of the term
 - iii. The Secretary records meeting minutes
 2. You can nominate yourself or someone else (with their permission).
 3. Submit nominations by October15
 - Elections will be held TBD

Topical Discussion selections:

Poll Results (as of August 12, 2024)

Topics for consideration. Select all that you would be interested in discussing. Select those you would be interested in leading/facilitating the discussion



Topic (sorted by number of interested votes)	Votes	Facilitate volunteer
Basic or Intermediate Level Topic: Integrating HOP concepts and principles into Work Control Documents	14	Rich Poliak
Advanced Level Topic: Metrics or KPIs – How to measure success in your safety culture after integration of HOP OR how to measure successful integration of HOP	13	
Intermediate Topic: What senior leaders can do to help with the integration of HOP concepts and principles	12	Chuck Ramsey
Basic Level Topic - Simple Roadmap for Beginning the HOP Journey – Steps to Integrating HOP in your company	11	Chuck Ramsey
Intermediate Level Topic: Integrating HOP into Critiques/Fact Findings and Causal Analysis process	11	Rich Poliak
Beyond traditional HPI practices	10	Rich Poliak
Advanced Level Topic: Effective Sustainability Efforts for HOP Integration – How to keep it going	8	Chuck Ramsey
Intermediate Level Topic: Effective use of DLA labs or portable/mobile DLA labs – The benefits associated with having a DLA lab/mobile lab	8	Daryl Smoldt
Basic Level Topic: How to provide continuous education and growth opportunities for new practitioners	7	

Pre-Job Brief HOP elements	7	Rich Poliak Daryl Smoldt
Basic Level Topic: Role of Craft Safety Advocates/Representatives with integration of HOP	6	
HOP Leads roles and responsibilities	6	
Integrating/applying HPI tools and practices	6	
Post-Job Reviews	6	
Basic Level Topic: I've just been trained as an HOP Practitioner – Now What? - Most impactful use of new practitioners	5	
Basic Level Topic: Creative and effective marketing ideas for rolling out HOP in your organization/company	5	
HOP Training	5	
Socializing HOP	5	
How to measure performance, especially in a lab space	4	
HOP Practitioners	4	
Basic Level Topic: Effective use of "Tchotchkes" related to HOP	3	
HOP Coaching/Mentoring	3	
Turning culture around. Shifting focus from production centered at all cost to efficient deliberate operations	Not in Survey	Katie Littleton

Additional suggestions/topics:

- Role of Reviewers in +/- HOP Outcomes
- DOE HPI Handbook update *Maybe in Nov/Dec)
- HOP Programs
- Turning culture around. Shifting focus from production centered at all cost to efficient deliberate operations. Facilitator: Katie Littleton (SPA)
- I'd like to discuss how HPI and Just Culture connects
- HOP principles in event analysis and corrective actions.
- Learning Teams, Performance Modes
- Mindfulness of the workplace/ relationship building with coworkers

- P3s-alignment between policies, processes and practices
- Translating HPI to HOP
- How Lessons Learned are captured and shared

d) **Announcements**

1. Welcome new team members



Stacy Jo Lancaster

Config. Analyst – Nuclear Safety Analysis Engineering

stacy.lancaster@pxy12.doe.gov

Contractor to the Department of Energy

(806) 662-3254 **Mobile**

i.

2. Job Postings

- i. HPI Academy at INL:

https://inl.taleo.net/careersection/inl_external/jobdetail.ftl?job=21808&tz=GMT-06%3A00&tzname=America%2FDenver

- ii. HOP Program Specialist at LLNL. <https://www.llnl.gov/join-our-team/careers/find-your-job/all/Human/3743990005216936>

- iii. Human Performance Improvement / Worker Safety & Health Professional opportunity at Pacific Northwest National Laboratory.

<https://careers.pnnl.gov/jobs/9597?lang=en-us>

- iv. WTCC In Washington state: [Plant Management - Human Performance Improvement \(HPI\) Coach - Richland, Washington, United States \(amentumcareers.com\)](https://www.amentumcareers.com/jobs/123456789)

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

- EFCOG Fall 2024 QA/ISM/CAS Joint meeting

- October 21-24

- Virtual

- Website: <https://efcog.org/15062-2/>

- The registration to the EFCOG 2024 Fall Event website is live:

- [https://efcog.org/15062-](https://efcog.org/15062-2/)

- [2/;!!Bt8fGhp8LhKGRg!BiwNZ3nJ2ZWqLw0dJFyPuJEm0iGORtHFsTuqbSXA6Wi9o46ik4Ikfci1nqeeEfXAsz9xRe4TayXTUNo5rwdagIUyJbc\\$](https://efcog.org/15062-2/;!!Bt8fGhp8LhKGRg!BiwNZ3nJ2ZWqLw0dJFyPuJEm0iGORtHFsTuqbSXA6Wi9o46ik4Ikfci1nqeeEfXAsz9xRe4TayXTUNo5rwdagIUyJbc$)

- HPI CoP will meet on Thursday, October 24. 10:00 AM EST to TBD

- Joe Lockwood has volunteered to host

- **Looking for presenters and topics – work with Joe directly**

- Human Performance in Action (HPAC)

- 2025 Conference:

- **March 17-19, 2025**

- **Location: Westin River Walk, San Antonio, TX**

- <https://www.humanperformanceinaction.com/>
- Ticket sales open October 1, 2024
- Community of Human and Organizational Learning (CHOL)
 - 2025 Conference: TBD
 - 2024 Conference FOMO series recap: <https://www.cholearning.org/post/it-s-a-wrap-fomo-series-recap>
- EUCL - Human Performance Community of Practice
 - <https://www.resilientgrid.com/hpcop>
 - Hosted by KnowledgeVine
 - **Next meeting is October 17**
 - HP Community of Practice discussions will continue to take place every **third 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>
- CHOL - Community of Human and Organizational Learning
 - <https://www.cholearning.org/>
 - Formerly HPRCT - <https://hprct.org> redirects you to the new webpage
 - Webinar: SYSTEMS LEARNING for HUMAN AND ORGANIZATIONAL PERFORMANCE
 - **(September 25, 11:00 AM – 12:00 PM EDT)**
 - Breaking the Forgetting Curve: Cost-Effective Post Course Reinforcement to Improve Training Results
 - Effective ROI strategies for post-course retention are possible. Join Richard Arnold a Human Performance Technologist with 40+ years of experience leading organizational analysis and development efforts across government, commercial, and international sectors. <https://www.cholearning.org/events/systems-learning-for-human-and-organizational-performance>
 - Events: <https://www.cholearning.org/professional-development>
 - NEWS: The latest from the Community: <https://www.cholearning.org/news>
 - Video Library on YouTube Channel: <https://www.youtube.com/channel/UCRbkD3m2ro7kCK-uF1X772A>

- Community Resources: Your first stop in organizational learning materials! <https://www.cholearning.org/community-resources>
- Our online interactive forum is now LIVE! Check-in back daily for insider access to Conference insights.
 - <https://www.cholearning.org/askthecommunity>
- HOP Hub
 - The HOP Hub is a consortium made up of the 11 of us...We have had the opportunity to get to work with companies, both big and small, to help them advance on their HOP journey. Our goal is to help you not need us.
 - Resources: <https://www.hophub.org/resources>
 - Contact information is on the home page
- Southpac Internation (HOP Lab)
 - Wegbsite: <https://www.southpacinternational.com/human-organisational-performance/what-is-hop/>
- PodCasts:
 - Counter-Errorism (James Newman and Ken Madson)
 - Pre-accident Investigation Podcast w Todd Conklin
 - The Safety of Work w David Provan
 - A HOP Podcast with No Name w Adrea Baker and Matt Florio
 - Health and Safety Conversations w Tim Bourne
 - Safety on Tap w Adrew Barrett
 - The HOP Nerd w Sam Goodman
 - Safety Labs w SLICE
 - Leading Safely Podcast w Georgina Poole
 - Rebranding Safety w James MacPherson 10. Psych Health and Safety w Peter Kelly
 - Amy Edmondson: How To Fail Well

Round Table (Those who provided updates in person or in chat)

- ANL
 - Stephanie Castelli (ANL)
 - Recently had an Assist Visit that looked at HPI as part of the visit. Looking to setup a graded approach for our causal process and incorporate learning teams.
- Hanford
 - Roby Robinson (Hanford)
 - Hanford 222-S Laboratory is finishing development of a new ConOps course with embedded HPI content. More to come as we roll this out in FY2025.
- INL
 - Becca Swaner (INL)
 - Business management group created an HPI Coach qualification for NS&T
 - **QUESTION:** Does anyone have experience or ideas for Dynamic Learning Activities (DLA's) for laboratory workers. I'd love to collaborate with folks who are teaching HPI.
 - Carly Burgess replied: SRS has 23 various DLA's
- LANL
 - Mike Petrowski (LANL)
 - Continuing Learning Team and HPI Training
- LBNL
 - James Newman (LBNL)
 - LBNL are continuing Learning Team path. Conducted 7 so far this year.
 - Focus for HOP putting together training for Division Safety coordinators adding HOP to this groups focus
 - Heavily focused on safety culture. Software program called “bucket list” provides recognition. Added SC badge that adds more points. Provides positive SC advocacy.
 - New charter for SCWG. Team working to publish the new charter
 - Going forward strategy document is focused on “psychological safety”.
- LLNL
 - Barbara Jesus (LLNL)
 - Continuing training ES&H staff in HOP
 - Continuing to progress with Learning Teams
 - **Question:** Susan Blackburn
 - Is your LLNL HOP training virtual?
- N3B
 - Joe Lockwood (N3B)
 - Just finished annual safety culture safety. (Attachment 10). We added HPI question. Do we focus on what failed and not who failed. Used the being human video to address the issue of blame and that

blame fixes nothing. That video really created some great conversations.

- ORNL
 - Susan Blackburn (ORNL)
 - Still progressing forward. Keeps growing and growing. 16-20 initiatives, in seven different directorates. Two tools: 2-minute drill badge card. Brand new HOP Tools guide – focusing on 10 tools for paper pushers or physical workers. FY25 focus is getting tool to the balance of staff and integrating tools.
- SLAC
 - Rich Poliak (SLAC)
 - Getting the opportunity to present to SLT. Kicking off multi-year effort to improve WP&C, which includes HPI, ...Will be asking for help from CoP
 - Energy Wheel, used in the construction industry, is something we are going to explore. Scientifically proven to increase awareness of energy sources and energy sources. Talking to ESO about applying it.
- SNL
 - Ben Close (SNL)
 - Working SC improvement – job aid and description for Learning Teams
 - Hosting Learning Team benchmarking team – every 6 weeks
 - Valery Webb Cline (SNL)
 - We are working on developing micro-learnings and short videos for Safety Culture at TA-V (Nuclear Technologies) at Sandia Labs.
- SPA
 - Amandi Jimenez (SPA)
 - SPA team will be on-site at LANL (week 10/7)
 - Nothing to add
- SRS
 - Carley Burgess (SRS)
 - Continuing HPI training and dynamic learning
 - SRS has 23 various DLAs
 - Casey Kearns (SRMC)
- WRPS
 - Darrell LeMastus (WRPS)
 - Received new suitcase HUPERT, using for refresher training. Anyone have experience with the suitcase HUPERT?
 - Chuck Ramsey uses the portable HUPERT
 - Becca had a question (INL) about DLA's
 - WRPS will be using a separate unit from another room that combines 3way communications.
 - WRPS had a DLA to assemble logos in a glovebox
- WTPP
 - James Vera (WTPP)

- Recently came back from VPPA National. Did four presentations on leadership. Connection between safety and HOP.
- HPI Initial and HPI leadership. Moving on to HPI for Engineers.
- Also have a job opening
- Y-12
 - Andy Hobbs (Y-12)
 - DOE Technical standard has been published.
 - <https://www.standards.doe.gov/standards-documents/1100/1197-astd-2024>
- Linda Flores (SNL) question:
 - How are you getting people excited about Learning Teams?
 - Feedback is that a Learning Team is not a causal so how can we use them.
 - Amanda recommended starting to use Learning teams for analyzing success, and positive tasks. Incorporate Learning Team method into a causal analysis.
 - Ben Close comment: Focus on process improvement or changes and it will be seen as positive and a technique to be used in an organization, helpful for event based learning teams
 - Rich commented that leadership support is important to make Learning Teams successful.
 - Rich commented that “worker engagement” is essential to getting the insights for a causal analysis
 - Andy Hobbs provided insights on merging causal analysis and learning teams. A learning team at its core is just a group interview.

4) Closing

Mike thanked everyone for participating. Next conference call is October 24 and will be canceled due to Fall ISM/QA.CAS Virtual Workshop

Look for an invitation from Joe Lockwood to the workshop HPI CoP Breakout session

Meeting concluded at 12:02 CST