



Learning Teams Methodology



Learning teams bring together those who are closest to the work to create a shared understanding of how work actually gets done in the field. This approach creates an environment of open communication, making it easier to understand the complexity of the work.

WHAT IS A LEARNING TEAM?	WHAT ARE THE KEY BENEFITS?	WHEN DO WE USE THEM?
<p>A learning team is a diverse group of people who are directly involved in a work activity or have useful information concerning an event.</p> <p>The purpose of a learning team is to learn and improve operational knowledge. Applying learning teams to the prevention of fatalities, serious injuries, and losses of containment results in stronger safeguards.</p>	<p>Learning teams help tell the story about the complexity of the work we do and how work gets done in the field.</p> <ul style="list-style-type: none">• Focus on identifying and strengthening safeguards• Generate possible solutions in hours not weeks• Identify error traps and latent conditions that other tools may not detect• Engage the people that do the work resulting in practical solutions• Make it okay to talk about mistakes	<p>Learning teams can be used when things have gone well or when things have gone wrong. Learning teams can be applied to safety, reliability, and business processes.</p> <ul style="list-style-type: none">• Explore normal and successful work (Proactive Learning): Evaluate safeguards and examine if they are aligned with how work is done.• Learn from events (Reactive Learning): Understand the context and identify broken or missing safeguards. Pinpointed solutions are developed by those who do the work.

LEARNING TEAM STEPS

Step 1: Prepare

- Scope is defined – not too broad, not too narrow.
- The right people are selected for the team, approximately 5-7 people closest to the work.
- **Leader Guide:**
 - Review the proposed learning team topic and suggest participants.

Step 2: Session 1- Learn

- 60-90 minutes
- Discover how work gets done versus how it is planned.
- Discuss the conditions that may influence how work is done and where drift may require different safeguards.
- **Leader Guide:**
 - *After you kick off the session, leave the room and allow the learning team session to start.*
 - *Come in to kick off the learning team with these cues:*
 - *Set the tone – encourage open and honest communication and role model it*
 - *Thank the team for their participation*
 - *The goal is to understand how work is done and the conditions surrounding the work*
 - *Asking the team to focus on the conditions that lead to (or can lead to) the event versus the event itself*
 - *Information will be used to improve operational knowledge and ensure effective safeguards are in place*
 - *This approach offers a way of looking at work from a different perspective. It may feel messy at the beginning. Trust the process.*
 - *The team is closest to the work and their help is needed to identify and implement the best possible safeguards and solutions. They are here because they are the ones who know most about this work.*

Step 3: Soak

- Soak time allows participants to reflect and process session 1. Often new insights may emerge and are shared in session 2
- Soak time is ideally overnight, but it can be over an extended lunchtime between session 1 and session 2
- **Leader Guide:**
 - *Protect soak time – it allows participants to reflect and process session 1. Often new insights may emerge and are shared in session 2*

Step 4: Session 2 - Brainstorm & Prioritize

- Identify error traps and latent conditions
- Evaluate safeguards
- Capture solutions that are within the team's control to explore
- Agree on what to improve first
- **Leader Guide:**
 - *At the end of session 2, the team may invite you to briefly share the learnings.*
 - *Observe the learnings from session 1 and acknowledge the complexity*
 - *Be curious – ask questions for understanding*
 - *Acknowledge the group's courage to communicate a difficult message when necessary*
 - *If you've made this process a safe environment, you are going to hear things that may surprise you. That's what you are looking for – how work is actually happening. If you hear something that conflicts with your views, don't react.*

Step 5: Take Action

- Document and share with leadership the results of the learning team
- Test and evaluate approved solutions
- Share learnings with others
- **Leader Guide:**
 - *The facilitator will write up a summary and share it with you*
 - *Accept the results as a gift – it's information you would not normally receive*
 - *The team may not find the "silver bullet" (one perfect solution). Support the team's initiative to test proposed solutions*
 - *Encourage the team to keep learning. It may take more than one learning team session to get to the solutions.*