



Electrical Transmission & Distribution Partnership

Continuing Education Training

Define & Plan

Presenter Guide

-3rd Quarter 2022

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Introduction

This Define & Plan Refresher course is a presenter lead (supervisor, safety professional) process. The presenter may choose to augment the material with videos, handouts, or other media to enhance the learning experience. The presenter may want to incorporate visual aids to enhance the presentation.

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

Edgar Dale stated that 2 weeks after a learning event, adult learners remember:

- ✓ 10% of what they read
- ✓ 20% of what they hear
- ✓ 30% of what they see
- ✓ 50% of what they see and hear
- ✓ 70% of what they say
- ✓ 90% of what they say while performing a task

Microsoft® PowerPoint® combined with good instructional skills and instructor/student dialogue work strongly in the fifty to seventy percent range. PowerPoint® presents the information to the attendee and the instructor 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 “Good discussion, but let’s get back to the subject at hand”.

Another tool is the “Parking Lot” which is simply a newsprint chart or dry erase board or note pad where the presenter records questions/discussion points not answered or addressed during the meeting and that may require more research. It is vital to capture any ongoing discussions or questions on the “Parking Lot” and follow up when the information is known.

Deliver this refresher during the second quarter of 2022. Delivery time is approximately 45 minutes to 1 hour, in one setting or divided-up into three, 15-to-twenty-minute settings. The presenter may deliver the topic in a formalized meeting room setting using the PowerPoint slide deck or by using the three, key point sheets (located at the end of each session) as in a tailgate safety talk. It is critical that the facilitator makes him or herself familiar with the material prior to delivery.

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Define and Plan Continuing Education 3rd Quarter 2022




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Introduce the module. Explain to the group that this module will address how leadership directly effects safety accountability.




INTRODUCTION

Leadership is defined as **ANY INDIVIDUAL** who takes personal responsibility for his or her performance as well as the company's or crew's performance and attempts to influence the improvement of the organization that supports that performance



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ANY INDIVIDUAL, this is the entire crew make-up from the groundman to the General Foreman and Supervision.

Provide examples of your own to facilitate discussion.



PURPOSE

The purpose of this presentation is to inform leaders how **Defining and Planning** can aid in establishing Safety Accountability within their work groups.

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Define and Plan is the first step in establishing Safety Accountability, followed by Equip, Measure and lastly Recognize and Coach. This module will focus on explaining the “Why”, “When” and “How” of Define and Plan.



Objectives

1. Define Accountability
2. Discuss the benefits of establishing Accountability
3. Define the “Why” & “When” of establishing Accountability
4. Discuss the “How” to establish Accountability
5. Discuss the common barriers of establishing Accountability

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During this module we will cover the following topics:

1. Define Accountability
2. Discuss the benefits of establishing Accountability
3. Define the “Why” & “When” of establishing Accountability
4. Discuss the “How” to establish Accountability
5. Discuss the common barriers of establishing Accountability



Define & Plan

ACCOUNTABILITY

PARTNERSHIP 5

Section Slide



What is Accountability

Accountability can be divided into two areas:

- Personal Accountability
 - Holding oneself to the standards set by self, team, and organization
- Team/Organizational Accountability
 - Ensuring people do what the team and/or organization expects and needs

PARTNERSHIP 6

Before we discuss how to establish Accountability, we must first define what Accountability “is”. Accountability is the act holding oneself to a set of standards set by either self, a team or an organization. This Module divides Accountability into two areas: Personal and Team/Organizational. Leaders should strive to establish Personal Accountability by **“Walking the Talk”**, as well as develop skills in fostering Team/Organizational Accountability. This section will focus on the first step to establishing Safety Accountability for the Team/Organization by discussing Define & Plan.



Four Steps to Establishing Accountability

1. Define and Plan
2. Equip
3. Measure
4. Recognize and Coach

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As discussed earlier Define and Plan is the 1st Step in Establishing Safety Accountability.



Define & Plan

“WHY” & “WHEN” TO ESTABLISH EXPECTATIONS

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Section Slide




Reason Workers Don't Do What's Expected

- They didn't know you wanted them to do it
- They didn't have the right materials or equipment
- They didn't get any feedback after doing it
- They didn't know how to do it
- They didn't want to do it in the first place
- The feedback they received was meaningless or confusing

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Review the items within each box on the slide.

A strong system of Safety Accountability addresses all the issues listed here.

Have you ever noticed any of these issues in your past or current role?




"Why" Set Expectations

- Workers understand expectations of doing the task
- No one can say they didn't know
- Safety, Quality, and Production improve
- Gives workers clear boundaries and expectations to follow
- People try to do what they think their boss expects
- Improvement is sustained for the individual and the organization

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Here are some other benefits of a strong accountability culture:

- Employees are trained effectively
- Needed resources are provided
- Performance is measured
- Employees receive appropriate feedback
- Communication is improved
- Business outcomes are positively impacted



“When” to Set Expectation

- ✓ At the beginning
 - ✓ During the onboarding process
 - ✓ When new expectations or changes occur
- ✓ Every day as we interact with our employees
- ✓ Periodic Summary Discussions

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Safety Expectations should be set early and revisited often to ensure compliance.

This module breaks the process into three areas:

1. At the beginning – During the onboarding process e.g., New Hire Orientation , when a new crew member joins the crew, and anytime new expectations or changes in process or policy.
2. Every day we interact with our employees – Leaders should routinely revisit the Safety Expectations
3. Periodic Summary Discussion – Provides an opportunity for Leaders to give constructive feedback to initiate change.



“WHEN” At the Beginning

During the onboarding process or when new expectations or changes occur

- Share your intent
- Communicate to create accountability
 - Job role expectations
 - Training and resources needed
 - How performance will be measured
 - How feedback will be given
- Agree on how to communicate the difficult messages

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- Share your intent as the leader of the team.
- Communicate to create accountability
 - Clearly explain the job expectations and confirm understanding
 - Explain what resources are available and decide if additional training will be required
 - Describe how job performance will be measured – Show them what “Right Looks Like”
 - Explain how feedback will be given
- Agree on how to communicate the difficult messages



“WHEN” Every Day

- As you interact with each other
- Pay attention to what people are doing
- Recognize what’s right!
- Coach to improve what’s wrong
- Reinforce standards and expectations at every opportunity

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Once you’ve observed their performance, you then have a responsibility to provide feedback based on what you observe. If you notice them working safely and accurately, you should provide them with positive recognition. Positive recognition is the single-most powerful thing you can do to steer them toward safe work and reinforce what you expect them to do. It’s easy, positive, and should be well received.



Periodic Summary “WHEN”

Employees

- Once per quarter
- Prepare them for what will be discussed
- Current status
- Future goals and development needs
- Employee does most of the talking

Leaders

- Once per month
- Structured according to what's important
- Subordinate does most of the talking
- Discuss **SMART** goals that have established

To aid in establishing Accountability among work groups, Leaders should conduct Periodic Summary discussions of the established Safety Expectations. For field level employees, it is recommended that this discussion takes place on a quarterly basis. For individuals in Leadership roles, it is recommended that these discussions take place on a monthly basis. These discussions should be sincere and focused on providing constructive feedback.



S.M.A.R.T GOALS

- S – Specific
- M – Measurable
- A – Actionable, Attainable
- R – Realistic, Relevant
- T – Time-Bound

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SMART goal setting provides a process for making sure goals are clearly written for the best chance of accomplishment.

The goals should be:

- Specific – Make your goals specific and narrow for more effective planning.
- Measurable – Define what evidence will prove you’re making progress and reevaluate when necessary.
- Actionable/Attainable – Make sure you can reasonably accomplish your goal within a certain timeframe.
- Realistic/Relevant – Your goals should align with your values and long-term objectives.
- Time-Bound – Set a realistic ambitious end-date for task prioritization and motivation.

By rule of thumb, the more clearly a goal is stated, the more likely it is to be achieved. The SMART goal-setting process helps you accomplish this.



Section Summary

- Definition of Leadership
- Accountability
- Why and When to establish expectations
- SMART Goals

Review the Section Key Points:

- Definition of Leadership
 - What does it mean to each person?
- Accountability
 - Both personal and team
- Why and When to establish expectations
 - Beginning, each day, summaries
- SMART Goals



Define & Plan

“HOW” TO ESTABLISH EXPECTATIONS

Section Slide



“HOW” to set Expectations

- ✓ Clearly and Specifically
- ✋ Firmly
- 👍 Positively
- ⌚ Do not emphasize competing priorities, such as speed

In an effort to deter from fuzzy or unclear expectations Leaders should utilize these 4 tools when setting Expectations:

- Be clear and specific with what your expectations are. Allow for questions and explain the “Why”.
- Be firm with your message, this will ensure that employees understand the importance and will be more engaged in the message.
- Recognize what is being done right. Reward/Praise employees for expectable behaviors.
- Do not emphasize competing priorities, such as speed. This could send the wrong message that production is more important than quality or safety.



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COMMON BARRIERS

Section Slide



Common Barriers

- Time Pressure
- Failing to view it as a value vs a priority
- Not sure what the expectations are or should be
- "My boss never asks me about it"
 - "My boss never asks me if I've completed the job briefing for the day."
- "My boss doesn't set expectations with me"

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Some of the Common Barriers associated with Communicating and Setting Expectations are listed on the slide. Our goal as Leaders should be to break down these barriers by clearly communicating our Safety Expectations of all team members.



Common Barriers Cont.

- "Didn't know it was my job"
- Pressure to get the job done from management or customer
- Not understanding accountability
- Lack of upper management support
- Lack of SMART expectations

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Some of the Common Barriers associated with Communicating and Setting Expectations are listed on the slide. Our goal as Leaders should be to break down these barriers by clearly communicating our Safety Expectations of all team members.



Questions for Review

1. In this module Accountability was divided into two areas, what were they?
2. Name some of the reasons workers Don't Do What's Expected?
3. When should Expectations be set?
4. What are the 4 key points in "How" to set Expectations?
5. What does the acronym S.M.A.R.T. stand for when setting goals?

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1. In this module Accountability was divided into two areas, what were they?
 - Personal
 - Team/Operational
2. Name some of the reasons workers Don't Do What's Expected?
 - They didn't know you wanted them to do it
 - They didn't have the right materials or equipment
 - They didn't get any feedback after doing it
 - They didn't know how to do it
 - They didn't want to do it in the first place
 - The feedback they received was meaningless or confusing
3. When should Expectations be set?
 - At the beginning
 - Everyday
 - Periodically
4. What are the 4 key points in "How" to set Expectations?
 - Clearly and Specifically
 - Firmly
 - Positively
 - Do not compare competing resources
5. What does the acronym S.M.A.R.T. stand for when setting goals?
 - Specific
 - Measurable
 - Achievable
 - Realistic
 - Time-Bound



Define & Plan

THANK YOU FOR YOUR TIME