

Learning Teams Facilitation Framework

A Learning Teams PDCA framework for facilitated learning, reflecting and improving your system.

Using Learning Teams to learn and improve in the workplace.

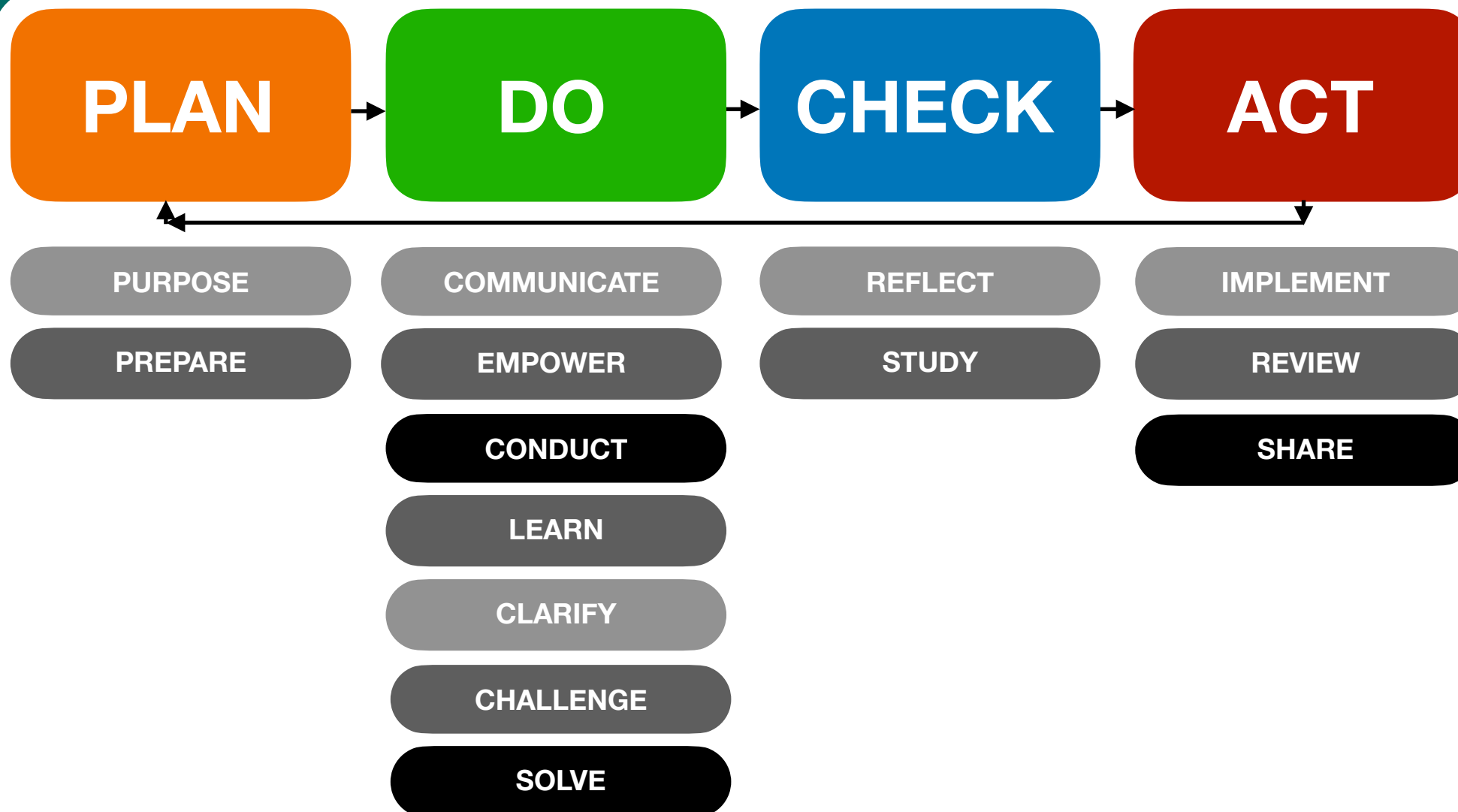
INTRODUCTION

In the 1950s, management consultant Dr William Edwards Deming developed a method of identifying why some processes don't work as hoped. His approach has since become a popular strategy framework, It allows organizations to formulate theories about what needs to change, and then test them in a **"continuous feedback loop"**. Deming himself used the concept of Plan-Do-**Study**-Act (PDSA). He found that the focus on Check is more about the implementation of a change. The focus of study is to understand why the change is working. He preferred to focus on studying the results of any improvements,

This PDCA Facilitation framework for Learning Teams has been developed to assist a facilitator gaining knowledge and experience in conducting Learning Teams by framing some of the key concepts and thinking to be applied. This framework is not a series of sequential steps to follow to undertake a Learning Team.

The role of the facilitator is to lead people through the Learning Team towards agreed-upon objectives in a manner that encourages participation, ownership and reflection by all those involved. Your own reflection about using this framework, the learnings gained from that reflection should be included in this framework as part of your own journey of learning and improving.

PDCA FRAMEWORK



PLAN

PURPOSE

What is the topic or theme of the Learning Team (it is important to set expectations for all stakeholders). **TIP:** If the scope is too wide, large or vague consider running multiple Learning Teams or reduce the scope.

PREPARE

- Who will be involved (the stakeholders)?
- Who in leadership is the sponsor for the Learning Team?
- Will the leader start the session and create the environment of "Psychological Safety"? (**Listened To, Respected, Raise Issues, Give Ideas, Acknowledged, Encouraged, Can Challenge, Recognised As Competent**)
- When will the leader re-join the group?
 - If during problem identification mode is the leader clear on their role of listening and being curious?
 - If during problem solving they listen and seek clarification about the situation, problem, implication and need?
- What other facilitation resources do you need based on the number of participants? (More than 8 people thinking about co-facilitation/note taker resources.)
- Where will it be held? or How it will be held?
 - Face To Face, Remote or Mixed
 - Is the space comfortable and quiet for the number of people to attend.
 - What technology, physical and people resources do you need to conduct and capture the stories, narrative and learnings.
 - How will breaks, drinks, food and continued attendance or disruptions and time keeping be managed?
 - How will time keeping be managed?
- When will it be held and how long will be it held for?

Session 1: Problem Identification/Clarity

Soak Time

Session 2: Problem Solving

Session 2: Ideas and Improvements

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DO

COMMUNICATE/EMPOWER “Communicate your plan to participants”

- A. Provide a clear purpose for the Learning Team and create the frame for "Psychological Safety".
- B. Outline the phases and why 'Soak Time' helps participants reflect and the organisation to learn.
- C. Inform participants not to prepare - just bring yourself, share your stories, listen to others and be curious.
- D. Inform the group if other stakeholders are present, what their role will be and how the information given and learnings will be used.

CONDUCT/LEARN

A. Conduct First Session: Problem Identification "Learning Mode".

- Facilitator to support learning mode by stimulating the conversation and asking open-ended questions that focus on understanding work and learning. (What can happen, How can it happen, Why can it happen, What is the likely impact)
 - What does routine work look like?
 - How hard is it to get things done?
 - What frustrates you on your job?
 - What doesn't make sense?
 - What do you do to make the job easier?
 - How doable are your procedures?
 - What tools do you have and do they work well?
 - What were the conditions leading up to the event?
 - What other near misses have you seen in this area?
 - What worked well?
 - What failed or went wrong?
 - Where else could a similar event happen?
 - What else should I know?, Who should this be shared with?
 - How did the actions or inactions of those involved make sense in their context? (Not yours!)
- Or use the **4D's** (Dumb, Dangerous, Difficult, Different) to start the conversations, then explore deeper.
 - a) When things don't make sense (Dumb).
 - b) When things don't feel right (Dangerous)?
 - c) When things don't go as planned or normal (Different)?
 - d) When things are harder than usual (Difficult)?
- Keep people in learning mode, some may want to move into problem solving mode.
- Capture the information in a way that allows the stories to flow and everyone can participate.
- Be aware of team dynamics, everyone is different, some will listen, contribute and share, or challenge.

B. Provide Soak Time (time and space) to give people time to think and reflect.

- "Soak Time" gives the participants time to reflect on assimilating new information and knowledge as learning. It provides the time needed for participants to relate new learnings to what they already know, adapt it for their purposes, and translate thought into action. Soak time supports a person's ability to think critically about the new information and ideas generated in the problem identification phase and their ability to think about individual learnings.

C. The facilitator needs to reflect and learn from?

- The team dynamics which became visible during learning mode.
- How the record-taking will flow into the next phase.
- How to summarise the information when starting the next phase.

DO

CLARIFY/CHALLENGE/SOLVE

A. Conduct Second Session: Problem Clarification Mode

- If new people have joined the Learning Team, it is essential to have the others walk the new people through the information gathered and for the facilitator to outline the process. The Learning Team is asked how they felt about the previous phase, what were some of their key reflections from what was discussed, and whether there is any additional information that they believe is of value.

B. Problem Analysis Mode

- The Learning Team participants need to share information they view as most important from their perspective to guide the conversation about what is already known about the problem. All the participants need to analyse the work together for group learning, querying and understanding the context of the work. Sticky notes or index cards to streamline notes and convert ideas into bite-sized chunks of information. A small phrase will work.
- Do a quick sort of the problems. Are there any that immediately grab the group's attention? The more the Learning Team have to think or ponder the more complicated or complex they are. Use groups such as **Simple, Complicated** or **Complex**.
- Create wall charts, mind maps or fishbone diagrams with problem categories/group headings, such as:
 - Machine (equipment, technology)
 - Material (includes product, consumables, and information)
 - Method (process)
 - Place (environment)
 - Resource (Manpower and Production)

C. Problem Solving Mode

- The Learning Team moves from discovery to problem solving brainstorming. The facilitator needs to support all ideas, without judgment, until the group have exhausted their ideas for improving the system so that the same conditions cannot recur. This phase is where organisational learning happens. It takes worker learnings and turns them into actions and actions that support safer outcomes for people. Stimulate with questions like:
 - What has been working well?
 - What needs to be done to improve the job?
 - What do you want to do differently
 - What do you want to do to make it better and safer?
 - When should there be a follow up to make sure things are getting done and working better?
 - How can small experiments or prototypes be set up to try some of the solutions?
 - How can the story be told? Who too?
 - How can progress be tracked on making improvements?

D. Problem Solution Mode

- Understand how effective or ineffective current defences/mitigations or controls are, and then determining if they are to be improved or removed.
- Understand what new defences/mitigations or controls are seen by the Learning Team as having the ability to improve safety outcomes for people.

CHECK (Study)

REFLECT "Keep a journal"

- What were the organization learnings?
- What did the participants learn?
- What did I learn as a facilitator?
- Where did I have to make do?
- What would I do differently next time?
- Who can I share this with to seek feedback to learn and improve? (Identify a Coach/Mentor)

STUDY

1. Summarise the improvement(s) for organisational learning. Use the **A3 SPIN** Outline as an alternative.
 - **Situation:** "The Context"
 - **Problem:** "What problem does the situation create for people and the organization?"
 - **Implication:** "What is the implication if we do nothing about (People/Environment/Product/Production//Organization"
 - **Need:** "What do we need to do to solve the problem, reduce the risk of the implication and improve the current situation".
2. Prioritise the improvement(s).
 - What workers can do and inform the organization of the outcome? "Quick Wins"
 - What workers and the organization can do together? Minor organisational improvements.
 - What the organization needs to do in co-operation with workers? Major organization improvements.
3. Create goals and objectives to act on that are "**SMART**", remember "**Talking gives context to doing**".
 - Goals should be specific and have an owner?
 - Make a goal with measurable progress, so the Learning Team participants can see the change as it occurs?
 - Think about the goal being achievable/attainable by considering social, economic, cultural and resource factors.
 - Think about the goal being realistic.
 - Develop a timeframe that is achievable and realistic.
4. Present/Share the learning outcomes to the organization and others. Use SPIN, take a video of the group discussing the learnings.

FOLLOW UP



As Dr Todd would say "**Remember that we are managing uncertain outcomes with certain controls**".

Using the P-D-C-A model of continuous improvement, you need to identify if the ideas and improvements are working as expected.

Conduct a mini Learning Team with the same people to reflect on the change. If they are not working as intended, you should:

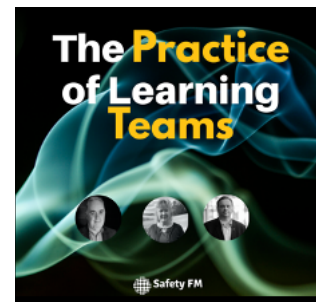
- 1) Improve and review, or
- 2) Remove and review.

**KEEP LEARNING AND IMPROVING
TO REDUCE UNCERTAINTY.**



This is to be read in conjunction with the book "The Practice of Learning Teams" - www.learningteamsbook.com

Continue your learning journey with the podcast "The Practice of Learning Teams" - www.learningteamspodcast.com



ACT

IMPLEMENT the learnings.

REVIEW - Did they work as intended? If not improve and review or remove and review. Don't allow waste to build in the system.

SHARE the Learnings and Outcomes (Worker and Organisation) with others. Build cross knowledge and capacity across the organisation. Make sharing deliberate, use the **3L's** (sharing should be Local, Lateral (across) and Level-Up).



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