

Theory in Action: Creating Social Justice in the Workplace through Safety

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EDUC 651

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May 5, 2019

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As companies are pushed to optimize operations and maximize profits, there is a growing need to solicit and value the input of all employees. Workplace safety is one entry point into collaboration, because keeping workers safe is a goal of both workers and managers. This paper will explore one way to promote collaborative critical inquiry through safety as a means to improve organizational learning / productivity and create a more socially just culture where everyone feels included and valued.

Safety Philosophy and Critical Inquiry for Social Justice

In the 1930s, Heinrich (1959) created his infamous safety triangle model, which posited that the number of low-severity accidents could successfully predict fatal accidents, to an approximate ratio of 300:29:1. This idea supported the behavior-based safety (BBS) approach that is still prominent in many industries today. In BBS, a focus is placed on observing and correcting worker behaviors after near-miss or low-severity accidents, with the idea that this will reduce the likelihood for fatal accidents (Geller, 2005; Dekker, 2014). While BBS is a useful model for newer operations, its focus on humans as a cause of error can blind organizations to larger, systemic issues in their systems and reinforce power differentials between workers and management. It also encourages organizations to religiously pursue a path to zero accidents, which is simply unrealistic. A growing number of safety academics and practitioners have realized that performance has plateaued with BBS and have moved to a new model, one that promotes learning, collaboration, and a restorative just culture.

While BBS focuses on correcting behaviors to produce a desired result, Human and Organizational Performance (HOP) dives deeper into the “why” and attempts to understand the systemic factors that contributed to an accident (Baker, 2018). It requires that we confront our

own biases and recognize the need to listen to the people who perform the day-to-day work in order to fully understand how the system may be vulnerable to failure. While there are limited research studies that quantify the benefits of HOP, anecdotal evidence from several organizations supports the claim that practicing these concepts can lead to more effective safety solutions, as well as improved workforce engagement and relationships. Ultimately, HOP marries critical inquiry with restorative/social justice to create collaborative learning environments that can bring organizational performance to the next level (Baker, 2018; Dekker, 2016).

Looking at organizational safety from an adult education perspective, we can use Jennings and Smith's (2002) model of critical inquiry to evaluate HOP's potential to create social justice in the workplace. The critical inquiry model consists of seven steps:

- 1) Examining existing assumptions, knowledge, and questions
- 2) Gaining (and creating) new information
- 3) Gaining new perspectives
- 4) Critical analysis
- 5) Sharing what was learned
- 6) Action
- 7) Reflection

These steps can be applied formally and/or informally, providing a thorough framework that can help us not only think critically about our assumptions and new ideas, but also take thoughtful action based on that critical analysis. As shown in the article, Smith's application of her action plan encouraged her to continue her critical inquiry in an on-going, iterative process, essentially transforming her teaching practices toward social justice (2002). By applying critical inquiry to safety accidents and the underlying organizational safety philosophy, it is possible to move employees toward a similar transformation.

Johnson's *Privilege, Power and Difference* (2018) is an excellent resource for encouraging a critical examination of various practices in organizations. He looks closely at

capitalism and patriarchal privilege, showing how they feed the values of individualism and control. He also points out that we are often blind to our privilege and may not consciously realize that we are devaluing subordinate groups (Johnson, 2018). This framework will be important in training managers to critically evaluate their current ideas about safety accidents and identify actions (like non-defensive listening) that will help them move toward social justice.

Using Jennings and Smith's (2002) and Johnson's (2018) ideas as a theoretical framework, my action plan will help move an organization's safety practices from BBS to the more socially just HOP philosophy.

Action Plan

The main objective of this action plan is to teach an industrial organization (that has plateaued in its progress with BBS) to apply critical inquiry to safety accidents using HOP principles as a way to promote social / restorative justice in the workplace. Because this is a new way of thinking that may feel like giving up control, it will be critical to provide managers with adequate support and on-going training. By giving workers a voice and a safe space for discussion, this program aims to build a more collaborative work environment with a learning mindset. Long-term, the goal for this action plan is to expand the application of critical inquiry and social justice to areas beyond safety and the workplace. The details of this action plan are described in the following sections: preparation, trial program, expansion, and long-term outreach.

Preparation

I anticipate that preparing to implement this action plan will require between two and seven years, depending on the support I am able to acquire from management. After completing my AET degree, my plan is to find a job in training and/or safety at an industrial company. In

order to accurately assess the potential for acceptance of a social justice-focused safety program I will have to observe the existing safety culture and power relations for several months and probably a few years. This observation period will include many “soft” conversations with employees at all levels of the organization, which will ultimately help me to uncover the explicit and implicit culture within the organization (Spradley, 1980). It is often the case that managers and workers have different values and beliefs, and it will be important to understand both viewpoints. Using Harro’s (2018) Cycle of Liberation model, the above tasks would fall into the Getting Ready stage. Completion of these tasks will lead to the Reaching Out stage, where I will need to find an ally in the management group (Harro, 2018). In the event that I cannot find an ally, I will have to divert my focus to gaining enough years of experience to become a manager, continuously building relationships with other managers and workers along the way (Building Community) (Harro, 2018).

Once I have established a path of influence, I will develop and present a business case for adopting a trial program of HOP. This business plan will have to cater to the capitalist goals of the organization – to make money as cheaply as possible (Johnson, 2018). Assuming that there is a successful BBS program already in place, I will not be able to use the argument that fewer injuries will reduce worker compensation claims and regulatory fines. How can a collectivist appeal be successfully made in a culture that values individual achievement (Weaver, 1999)? There is an increasing collection of anecdotal evidence that supports the benefits of HOP programs, but little quantitative data. Given this lack of quantifiable data, I think my first goal will be to recommend small changes in how we react to unsafe behavior – to first ask questions to understand why, instead of just telling workers what to do (Dekker, 2014). Another tactic I might use (for larger impact) is to gather accident data to show how the organization has

improved and plateaued using the BBS program, and suggest the idea that we are ready to build on (not replace) the current program with a HOP philosophy. I might present the idea that our current model encourages us to be surprised by accidents, when we could do better if we assumed that failure was inevitable and took steps to prepare our workers to react in a safe way. (Managers like to be able to predict.) As Baker (2019) shows in her Safety Differently article, I might use the automobile industry for comparison – they have realized that no matter how good individual drivers are, accidents WILL happen, so they have created a system that is more resilient to errors. Obviously, this business case is a work in progress and its acceptance will depend on a variety of factors. It may have to be a less formal plan that is implemented in pieces until the cultural climate is ready for the philosophical shift to HOP. Eventually, I hope to gain support for a trial program of HOP that uses the low-cost method of Learning Teams in order to evaluate the causes of safety accidents (Baker, 2019).

Trial Program

Implementation of the Learning Team trial program is anticipated to take 12-18 months. First, we will need to invest a small amount of time and money into training a small group of safety employees and workers to be Learning Team facilitators. Additionally, we will provide training to managers in order to gain a better understanding of the underlying philosophy and program deliverables; a critical component of this training will be to allow skeptics to ask questions. (Depending on the budget, I would prefer to use an outside contractor for this initial training.) Once training has been completed, we will test the trial program when safety accidents and near-misses occur.

Using the Learning Team model, we will gather a team of 4-6 workers and non-managers, including the workers who were involved in the accident. This team will first enter into Learning

Mode - a guided discussion about how that type of work is done. By learning how work is normally done by the workers who are most intimately involved in the process, we can address barriers that prevent the work from getting done in a safe and timely manner. By giving these workers a safe space to voice their concerns, the Learning Team program aims to increase their engagement and build trust between workers and managers. After Learning Mode, the team will rest for the day to allow for overnight Soak Time. The next day the team will re-enter Learning Mode to ensure that any new insights are written down before moving on to the Evaluation phase. This phase involves critically analyzing the collected observations to define the current defenses and evaluate their effectiveness. Then the team will brainstorm new defenses, choose the most viable options, and create an implementation (action) plan. This plan, along with a summary of the lessons learned, will be shared with the management team. Ultimately, the goal of Learning Teams is to use the experience and brain power of all employees to gain a better understanding of how work is done and how it can be improved.

As you might have noticed, the Learning Team procedure loosely aligns with Jennings & Smith's Cycle of Critical Inquiry (2002). It combines the phases of examining existing assumptions, gaining and creating new information, and gaining new perspectives in Learning Mode, followed by critical analysis, sharing learnings with management, and creating an action plan to improve the workplace. Reflection is formally included in Soak Time, and informally included as both managers and employees think about the effects that come from this collaborative critical inquiry program. The practice of applying formal critical inquiry to safety accidents helps lead to social justice by putting power into the hands of typically subordinated workers and providing managers with opportunities to listen to new ideas and hopefully re-evaluate negative assumptions of these workers.

While the hope is that this process begins to create mutual trust and quantifiable process improvements, it must be evaluated to prove its effectiveness. My plan is to solicit verbal feedback after each incident, along with a written employee survey every 6 months. This will allow us to adjust the training and Learning Team procedure as needed to fit organizational needs. At the end of the trial, we will evaluate the program with a comprehensive written survey that will evaluate the cultural changes in the organization as perceived by both managers and workers.

Program Expansion

Assuming the trial program meets the goal of creating a more collaborative, socially just culture, we will implement a permanent program and look to expand its influence. First, we will expand opportunities for Learning Team facilitation training to all employees. We will also create a permanent feedback mechanism for both the training and the Learning Team events; this will likely be in the form of a short survey that the safety team can use to continuously improve and address concerns that arise. With the successful adoption of the HOP philosophy and collaborative critical inquiry, we will consider expanding outside the safety department. This might start with a multicultural organizational development assessment to gauge potential areas for social justice improvement within the facility (Holvino, 2008). Representatives from a variety of disciplines might identify an item on the survey and gather a Learning Team of interested employees to evaluate the issue and potential solutions. The results of these Learning Teams might lead to new hiring practices, HR policies, etc. Ultimately, the hope is to embody the idea of on-going critical inquiry and transform the organizational mindset into one that continuously pursues more socially just practices in all areas (Jennings & Smith, 2002).

In addition to this expansion, we will provide on-going training for managers to address power relations and social justice in a more direct way. While managers will be encouraged to ask skeptical questions, they will also be encouraged to listen without getting defensive (Johnson, 2018). We will pull topics from social justice education texts like *Power, Privilege, and Difference* to help managers become more aware of their privilege and power, and give practical suggestions for how to act on this awareness (Johnson, 2018). We will also bring in site diversity groups to encourage real discussions of site issues by those who are members of historically oppressed groups. (If diversity groups do not exist, we will encourage their creation at this point.) In reality, the goal is for the site to start to manage their own social justice and critical inquiry development without external prompts.

Long-term Outreach

Having successfully created a continuously improving, socially just culture at one work facility, we will reach out into the larger community. First, we will share our learnings with other sites in the company (if any exist) and offer to provide training for Learning Teams and HOP foundations. At the same time, we will reach out to regional higher education institutions (where we recruit employees) and offer to partner with them to provide classroom and site opportunities to experience collaborative critical inquiry through Learning Teams. The primary target of this outreach will be business and engineering programs, since these are the most likely candidates for management. The goal will be to train students on social justice concepts before they are hired as employees in our company or elsewhere.

Critical Evaluation / Analysis

Let's take a look at how the action plan meets the previously defined objectives:

- 1) Learn and apply critical inquiry with a social justice focus

- 2) Build a more collaborative, learning-focused work environment by giving workers a safe space for discussion
- 3) Support managers in on-going development of critical inquiry and social justice skills
- 4) Expand social justice mindset beyond safety and the workplace

The HOP philosophy and Learning Teams are established methods for promoting critical inquiry in the workplace. Because Learning Teams bring workers into the discussion and ask that managers stay out of the beginning process, they provide a space for workers to have a voice. By listening to the perspectives and ideas of these typically subordinated workers, we are promoting engagement and social justice. A more engaged workforce multiplies the thinking power of an organization, enabling it to survive in an increasingly competitive capitalist society.

One of the most critical components of successful implementation of this program will be buy-in from managers. Therefore, this action plan includes initial and on-going training for managers to promote development of their critical inquiry and social justice skills. Additional methods for gaining and maintaining management support include encouragement of skeptical questions in the training sessions and providing semi-annual survey results to make the progress of the program visible and quantifiable. In the last two phases of the action plan, we aim to branch out of the safety department into the rest of the site, other company sites, and educational institutions. While there is no guarantee of adoption, the plan provides a foundation for creating evidence that presents a compelling case for adoption, as well as robust support and evaluation mechanisms.

Limitations and Obstacles

There are several possible obstacles that could limit the action plan, especially in the preparation stage. First, management support of the program is a key component that may be

difficult to achieve. Local managers receive significant pressure from corporate management, board of directors, and shareholders to increase profits while minimizing operating costs.

Because the HOP program outlined by this action plan does not appear to have a direct monetary benefit and the existing BBS program seems to be serving its purpose, it will likely be difficult to convince management to change. As mentioned in the preparation, the political climate within the organization may leave me no choice but to work into a management position where I gain the power to implement such a program. Once I get to the point of start the trial program, it will be important to prove its effectiveness as described in the action plan.

Another obstacle that may hinder the program is the constant rotation of site managers. New managers will be unfamiliar with the HOP program and many want to go back to a BBS program. To discourage this, we will encourage other managers to share their opinions and experiences with the program. We will also include these managers in the training sessions, calmly and honestly addressing any skepticism.

Summary

Workplace safety is one potential entry point into using critical inquiry for social justice, because keeping workers safe is a goal of both workers and managers. As outlined by the Action Plan, we plan to promote critical inquiry through the use of Learning Teams during the investigation of safety accidents. The practice of applying formal critical inquiry to safety accidents helps lead to social justice by putting power into the hands of typically subordinated workers and providing managers with opportunities to listen to new ideas and hopefully re-evaluate negative assumptions of these workers. Because one of the most critical components of this plan will be manager buy-in, this action plan includes initial and on-going training for managers to promote development of their critical inquiry and social justice skills. It also

includes encouragement of skeptical questions in the training sessions and provisions for semi-annual survey results to make the progress of the program visible and quantifiable. A company that successfully adopts the HOP philosophy and critical inquiry process should naturally recognize the benefits of a more engaged workforce and seek to expand into areas outside of safety. Ultimately, the goal is to create on-going critical inquiry throughout the company that expands the promotion of social justice into areas other than the manager-worker power differential, such as racial and gender inequity, etc.

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