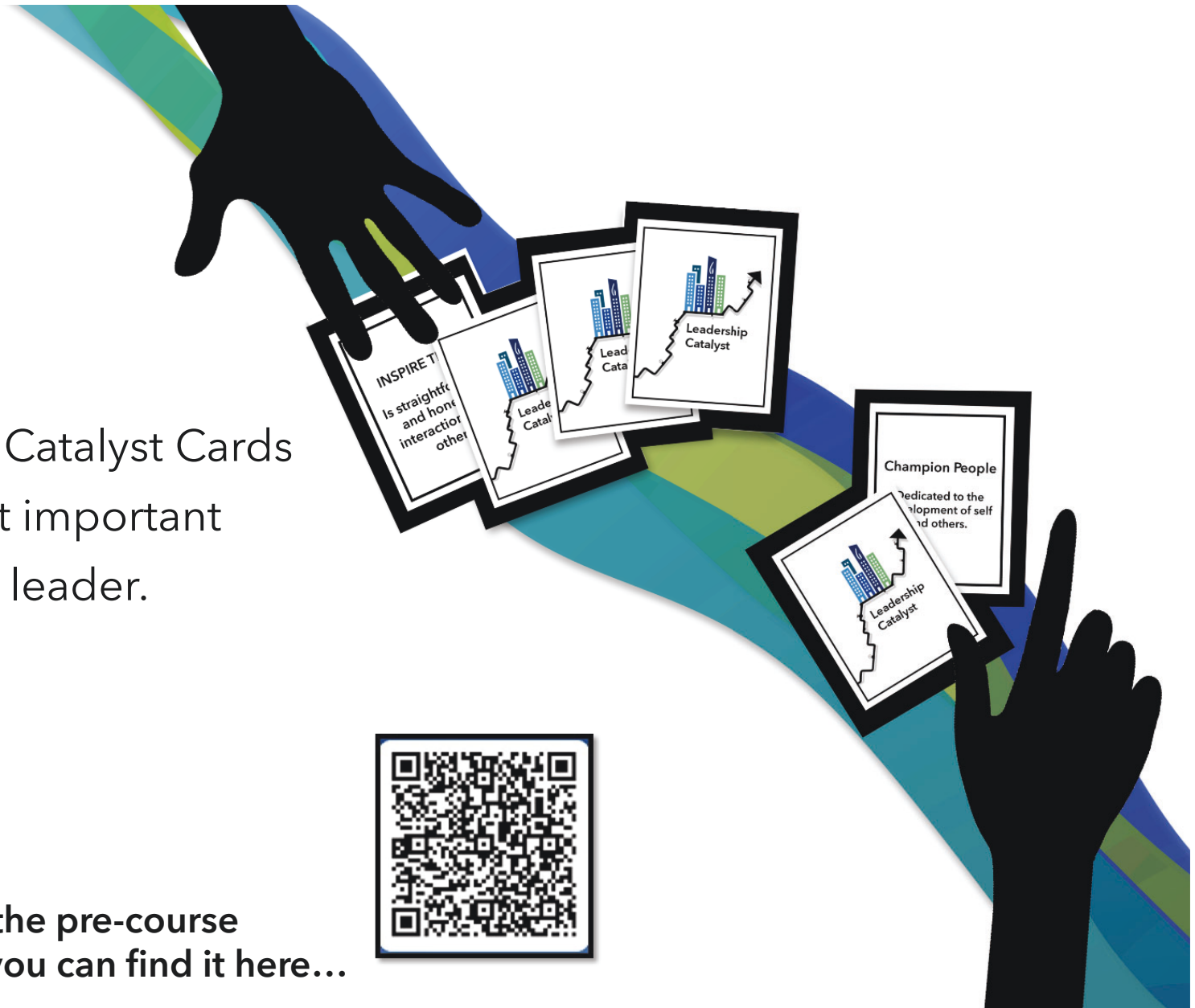


# APPENDIX J

# WELCOME!

Please select 3 Leadership Catalyst Cards that best describe the most important investments you make as a leader.



5

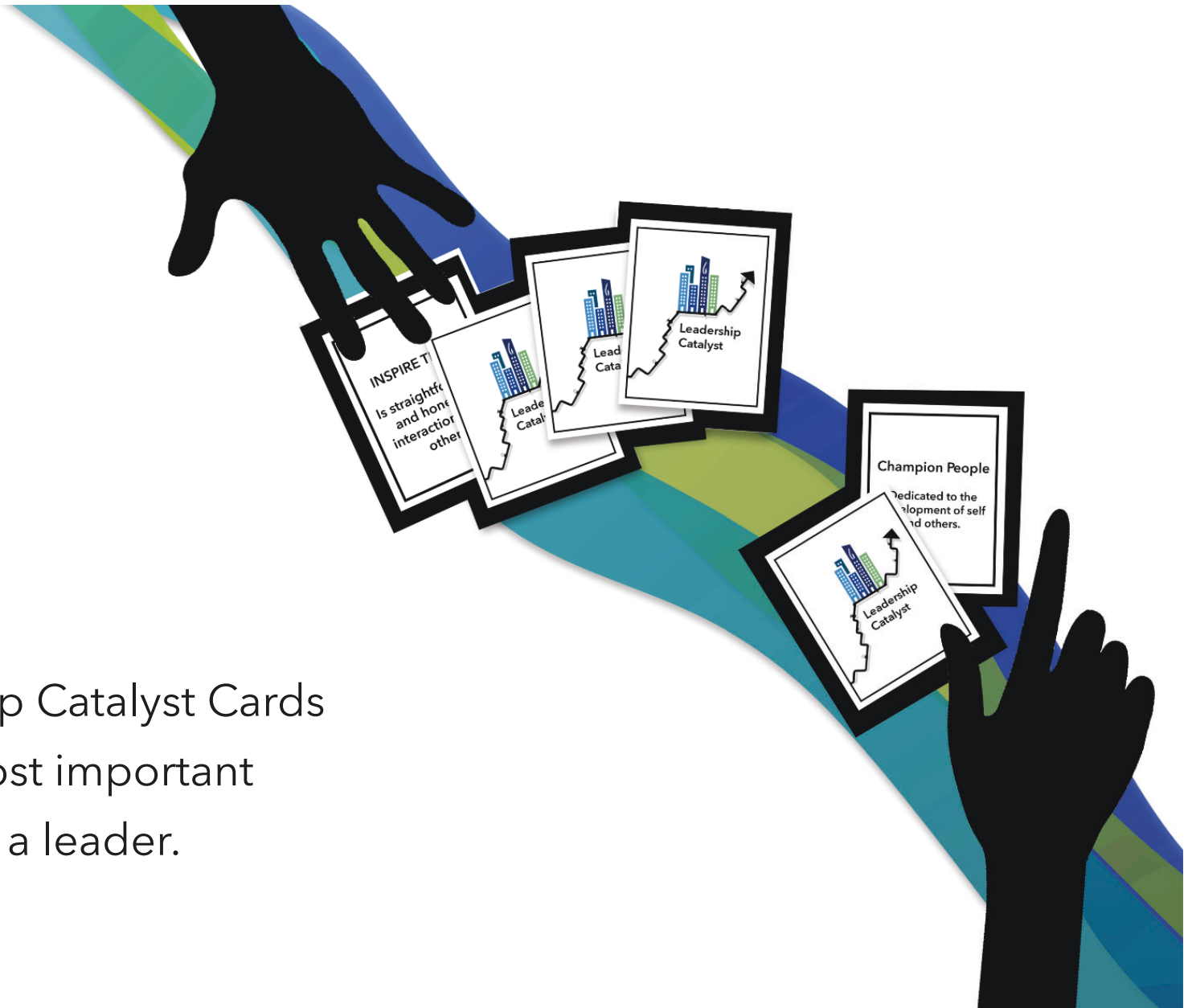
Also...did you respond to the pre-course knowledge check? If not, you can find it here...



# WELCOME!

Please select 3 Leadership Catalyst Cards that best describe the most important investments you make as a leader.

5





**SoCalGas University**  
*Inspiring Minds. Building Skills.*



---

GUEST SPEAKER

LEADER NAME

LEADER TITLE

# What we'll explore together...

## CULTURE

- What it means to us.
- Its connection to safety and performance.
- What current culture vs aspirational culture looks like on YOUR team.

## SAFETY

- What it means to us.
- It's connection to performance and culture.
- What comprehensive safety looks like.
- Your safety influence.

## PERFORMANCE

- What it needs to accomplish.
- It's connection to safety and culture.
- What leading performance looks like.
- Holding high-stakes conversations.





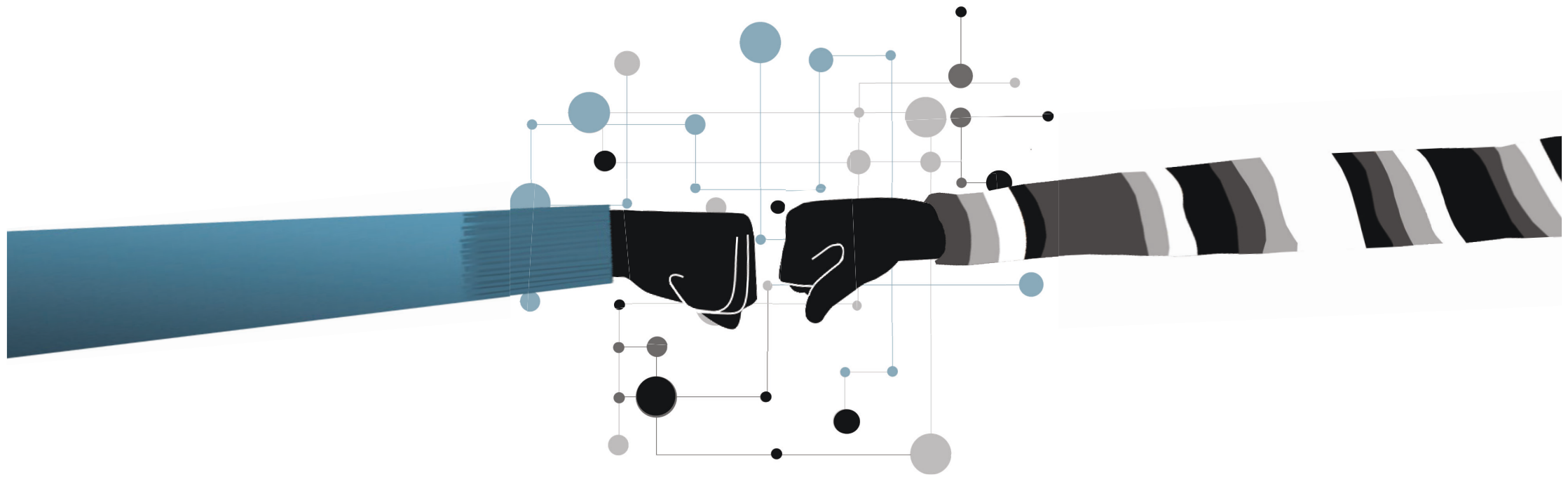
## TODAY'S SESSION



## INTRODUCTIONS

- Name.
- Location.
- Leadership role.
- 1 card you selected earlier, and why its one of the most important leadership investments you make.





## CATALYST PARTNERS

- Selected in class...pair up throughout.
- 3-month partnership.
- 3 meetings to share experience, insights, and feedback.



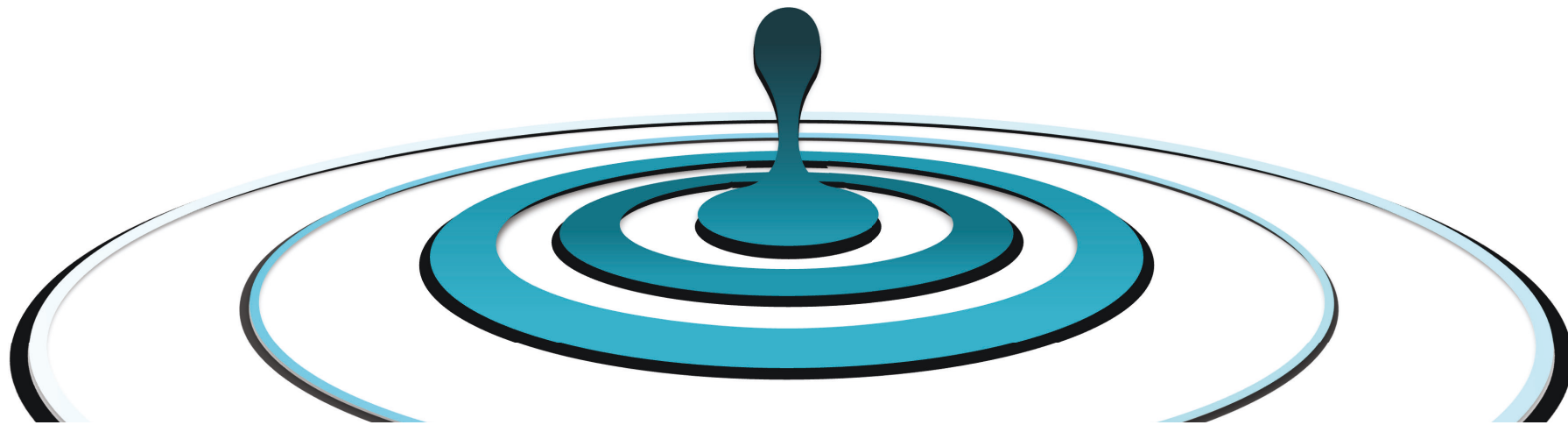
**SAFETY**

**PERFORMANCE**

**CULTURE**



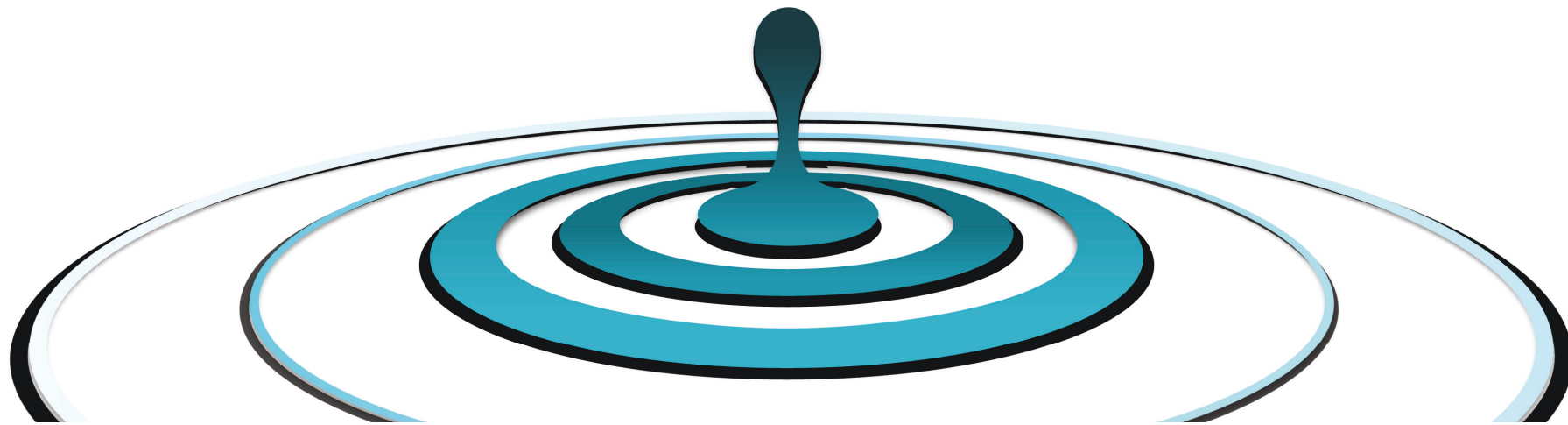
CULTURE



# CULTURE



*What does it mean to you?*



**CULTURE is the ongoing demonstration  
of aligned beliefs\* and behaviors.**

**\*Belief is an acceptance that the organizational culture  
we aspire to is beneficial and just.**

**CULTURE =**  
the way we do things around here.

**CULTURE =**



The way we  
relate to one another.



**CULTURE =**



**The way we  
communicate.**

**CULTURE =**



**The way we  
approach safety.**

**CULTURE =**



**CULTURE =**



**The way we  
give feedback.**



**CULTURE =**

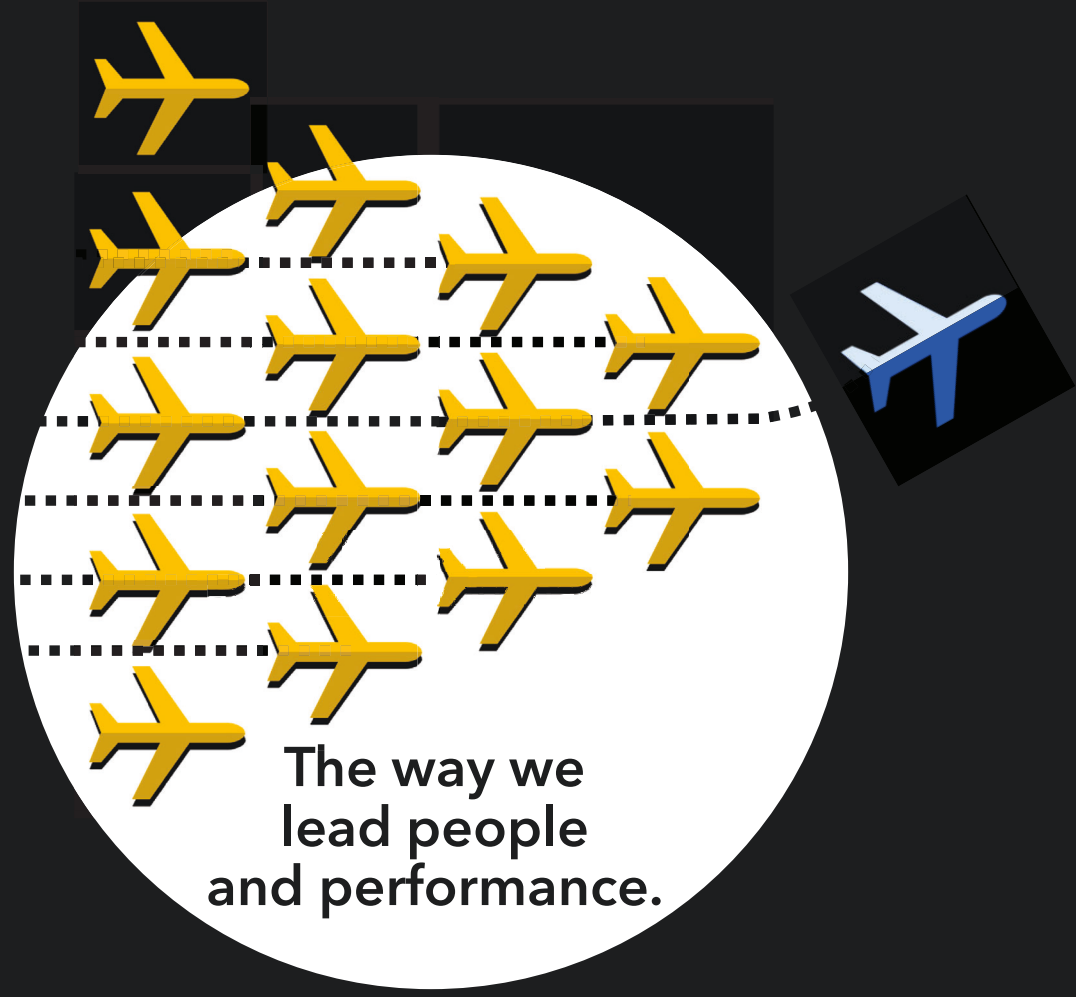


**CULTURE =**



**The way we  
measure success.**

CULTURE =



**CULTURE =**  
the way we do things around here.



**CULTURE IS THE FOUNDATION OF PERFORMANCE AND SAFETY.  
IT SHAPES OUR FUTURE AND ALLOWS US TO EFFECTIVELY  
ADAPT WITH FLUIDITY AND PURPOSE. IN AND OF  
THIS ECOSYSTEM, WE FIND OURSELVES CONNECTED,  
FOCUSED, AND EMPOWERED. WHAT IF WE COULD AMPLIFY  
ITS IMPACT EVEN FURTHER?**

*What does this statement mean to you?*

**CULTURE IS THE FOUNDATION OF PERFORMANCE AND SAFETY.  
IT SHAPES OUR FUTURE AND ALLOWS US TO EFFECTIVELY  
ADAPT WITH FLUIDITY AND PURPOSE. IN AND OF  
THIS ECOSYSTEM, WE FIND OURSELVES CONNECTED,  
FOCUSED, AND EMPOWERED. WHAT IF WE COULD AMPLIFY  
ITS IMPACT EVEN FURTHER?**

**NOW, look at the paragraph to find an answer  
that will be the same for us all.**

**COUNT all the Fs in the paragraph.**

**CULTURE IS THE FOUNDATION OF PERFORMANCE AND SAFETY.  
IT SHAPES OUR FUTURE AND ALLOWS US TO EFFECTIVELY  
ADAPT WITH FLUIDITY AND PURPOSE. IN AND OF  
THIS ECOSYSTEM, WE FIND OURSELVES CONNECTED,  
FOCUSED, AND EMPOWERED. WHAT IF WE COULD AMPLIFY  
ITS IMPACT EVEN FURTHER?**

**How many did you count?**

**CULTURE IS THE FOUNDATION OF PERFORMANCE AND SAFETY.  
IT SHAPES OUR FUTURE AND ALLOWS US TO EFFECTIVELY  
ADAPT WITH FLUIDITY AND PURPOSE. IN AND OF  
THIS ECOSYSTEM, WE FIND OURSELVES CONNECTED,  
FOCUSED, AND EMPOWERED. WHAT IF WE COULD AMPLIFY  
ITS IMPACT EVEN FURTHER?**

# BLIND SPOTS

## Attribution error:

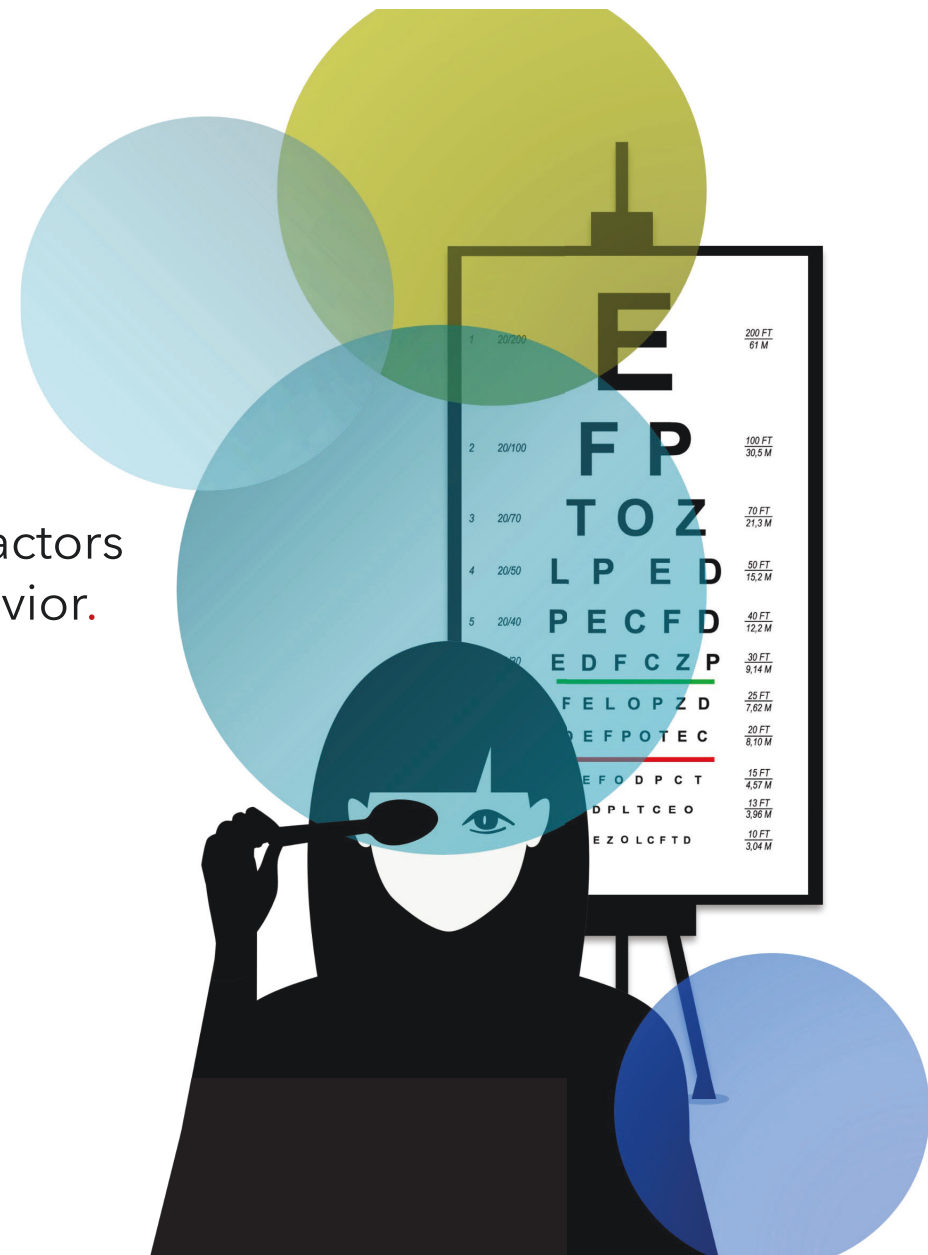
Overestimating internal factors, like a person's personality traits, and underestimating external factors that may have contributed to their decision/behavior.

## Leadership's shadow:

The influence a leader has on their employees.

## False consensus effect:

The belief that our own opinions, beliefs, and attributes are more common than they are.





The way we relate to one another.



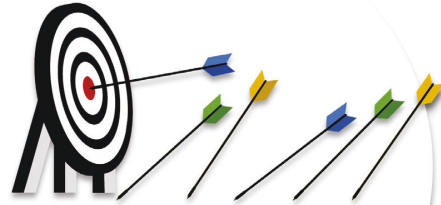
The way we communicate.



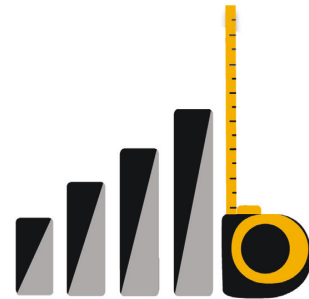
The way we approach safety.



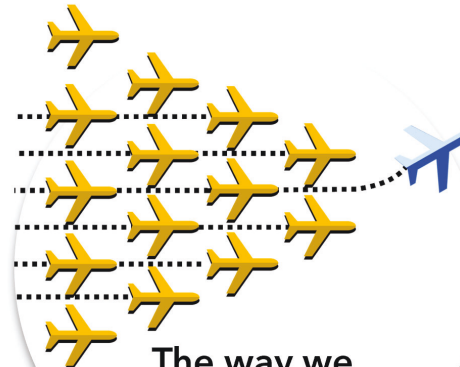
The way we give feedback.



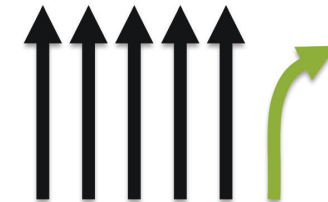
The way we respond to mistakes.



The way we measure success.

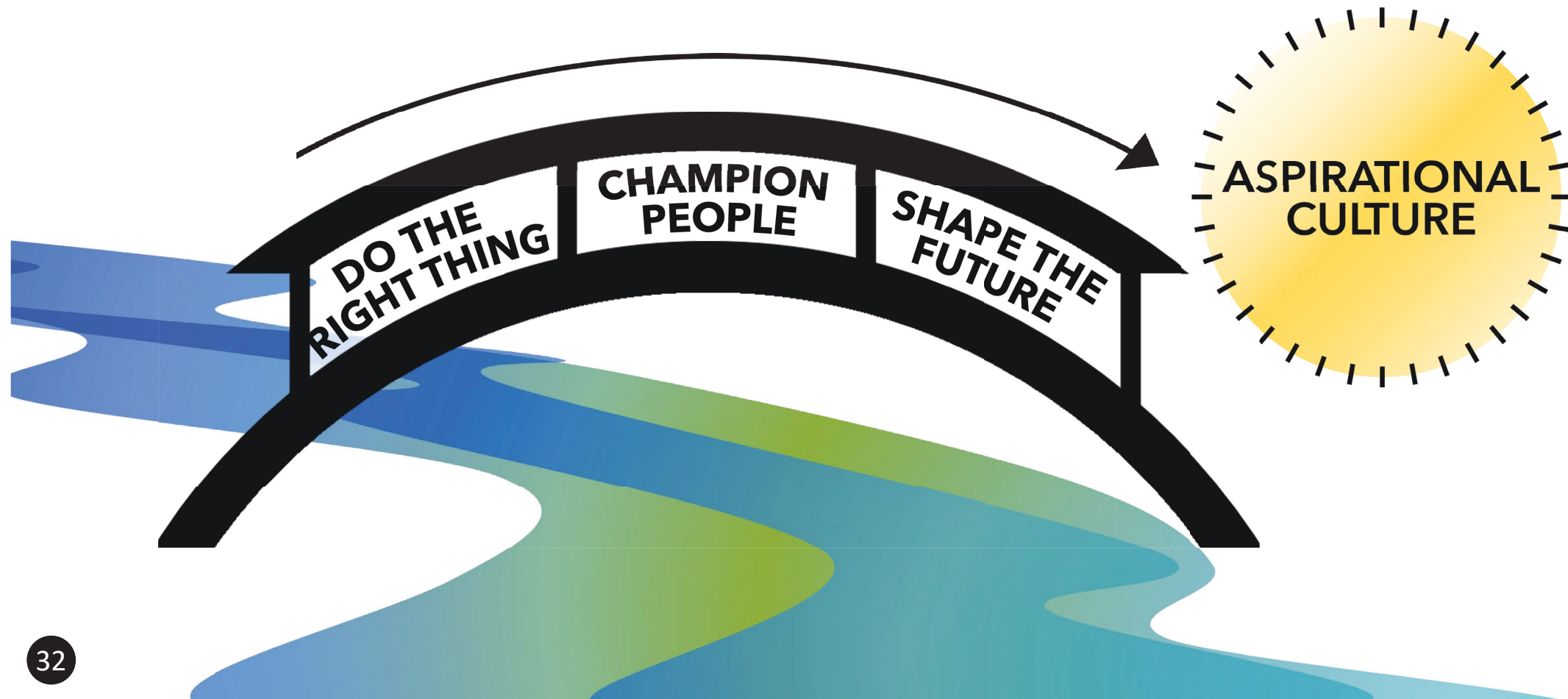


The way we lead people and performance.



The way we implement change.





# ASPIRATIONAL CULTURE

**DO THE RIGHT THING:** We are guided by our ethics, our focus on safety and our willingness to stand for what is right.

- We hold ourselves and others accountable to act in the benefit of the company, the public, our customers, and each other.
- We are relentless in identifying and addressing risks.
- We know when to elevate issues and ask for help.
- We pursue a holistic approach to measuring performance and success.

**CHAMPION PEOPLE:** We invest in people and value diversity and inclusion because it elevates performance and helps us partner responsibly.

- We celebrate diversity and create space for differing perspectives, ideas, experiences, and strengths.
- We create open lines of dialogue, and foster transparency in decision-making.
- We are dedicated to the development of ourselves and others.
- We prioritize the well-being of our employees and communities.

**SHAPE THE FUTURE:** We are forward thinkers who innovate and collaborate with stakeholders to make a positive difference.

- We are committed to continuous learning, acknowledging our mistakes and growing from them.
- We challenge the status quo, invite questions, and foster healthy conflict.
- We successfully implement collective, creative problem-solving to complex scenarios.
- We have a shared responsibility to enrich our culture through our collective commitments, actions, and connections.



## YOUR TEAM CULTURE

Discuss with your Catalyst Partner:

- The “*way we do things*” culture example that resonated with you earlier, and how the 3 blind spots can potentially affect it.
- Select one or more Aspirational Culture cards needed most to lead your team to the aspirational culture.
- How you can support each other to achieve your selection.



# SAFETY FORWARD

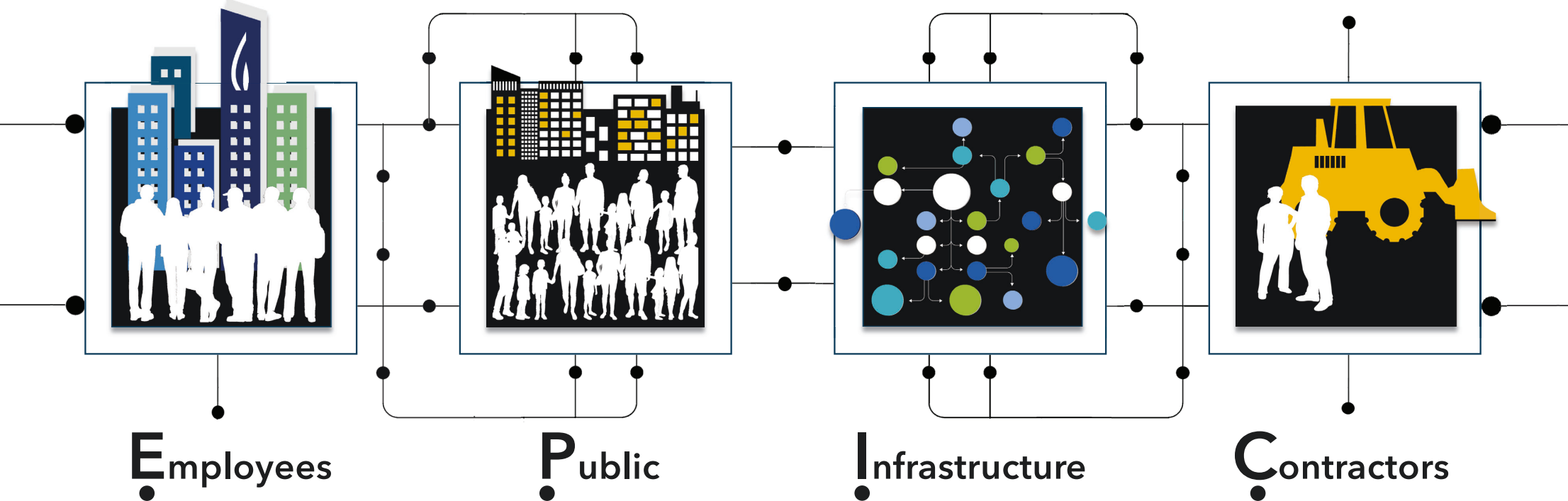
Leading, Learning, & Improving Together

Safety Forward is rooted in the idea that we are all leaders when it comes to advancing safety and evolving our culture for a better tomorrow. It is a set of actions we are taking to shape and develop our culture and mindset through engaging in open conversations, listening to learn, and empowering others.

**An evolved approach to SAFETY.**

**“ Safety is everything we do across the enterprise - from office support roles to work in the field - to recognize and mitigate hazards and keep the public, our infrastructure, our contractors, and each other safe. ”**

# COMPREHENSIVE SAFETY



Comprehensive Safety is about our thinking and actions on behalf of the broad and complex nature of the work we do.

## Employees

- Interact with directly/indirectly.
- Communication.
- Policy/Procedures.
- Resources/tools/supplies.
- Facilities.
- Injury Prevention.
- Scheduling.
- Event planning.
- Driving/parking.
- Performance support.
- Environmental impact.

## Public

- Interact with directly/indirectly.
- Communication.
- Policy/Procedures.
- Resources/tools/supplies.
- Facilities.
- Construction/Road work.
- Scheduling.
- Event planning.
- Driving/parking.
- Work in or near homes.
- Driving/parking.
- Surrounding communities.
- Environmental impact.

## Infrastructure

- Interact with directly/indirectly.
- Communication.
- Policy/Procedures.
- Facilities.
- Construction.
- Technology.
- Cyber security.
- Financial.
- GRC - rate case.
- Regulatory.
- Scheduling.
- Sustainability.

## Contractors

- Interact with directly/indirectly.
- Communication.
- Policy/Procedures.
- Resources/tools/supplies.
- Construction/Road work.
- Scheduling.
- Event planning.
- Driving/parking.
- Performance support.

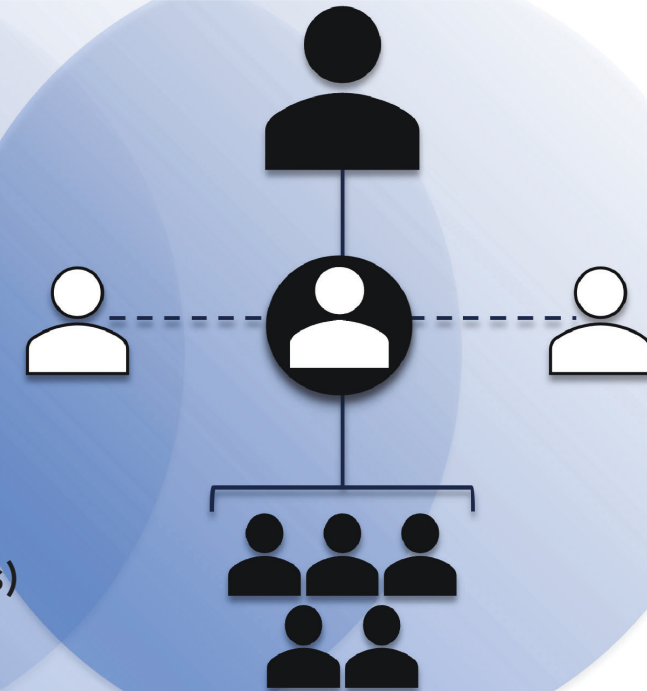


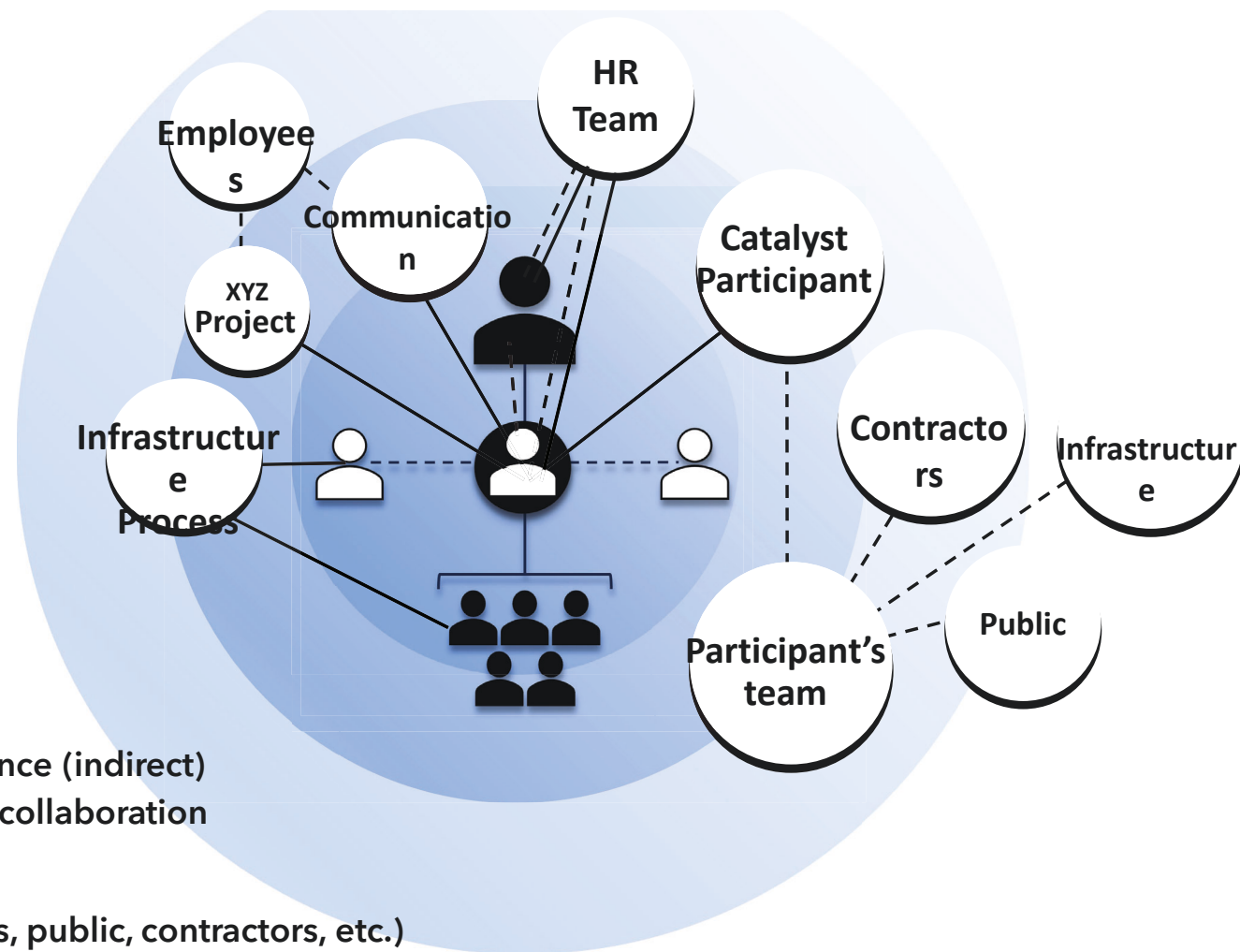
**AWARENESS:**

- Thinking and decisions
- Actions (direct) and influence (indirect)
- Relationship, partnership, collaboration

**IMPACT:**

- Groups/Teams (employees, public, contractors, etc.)
- Infrastructure (systems, processes, procedures, facilities, resources)
- Efforts (goals, projects, initiatives, etc.)





**AWARENESS:**

- Thinking and decisions
- Actions (direct) and influence (indirect)
- Relationship, partnership, collaboration

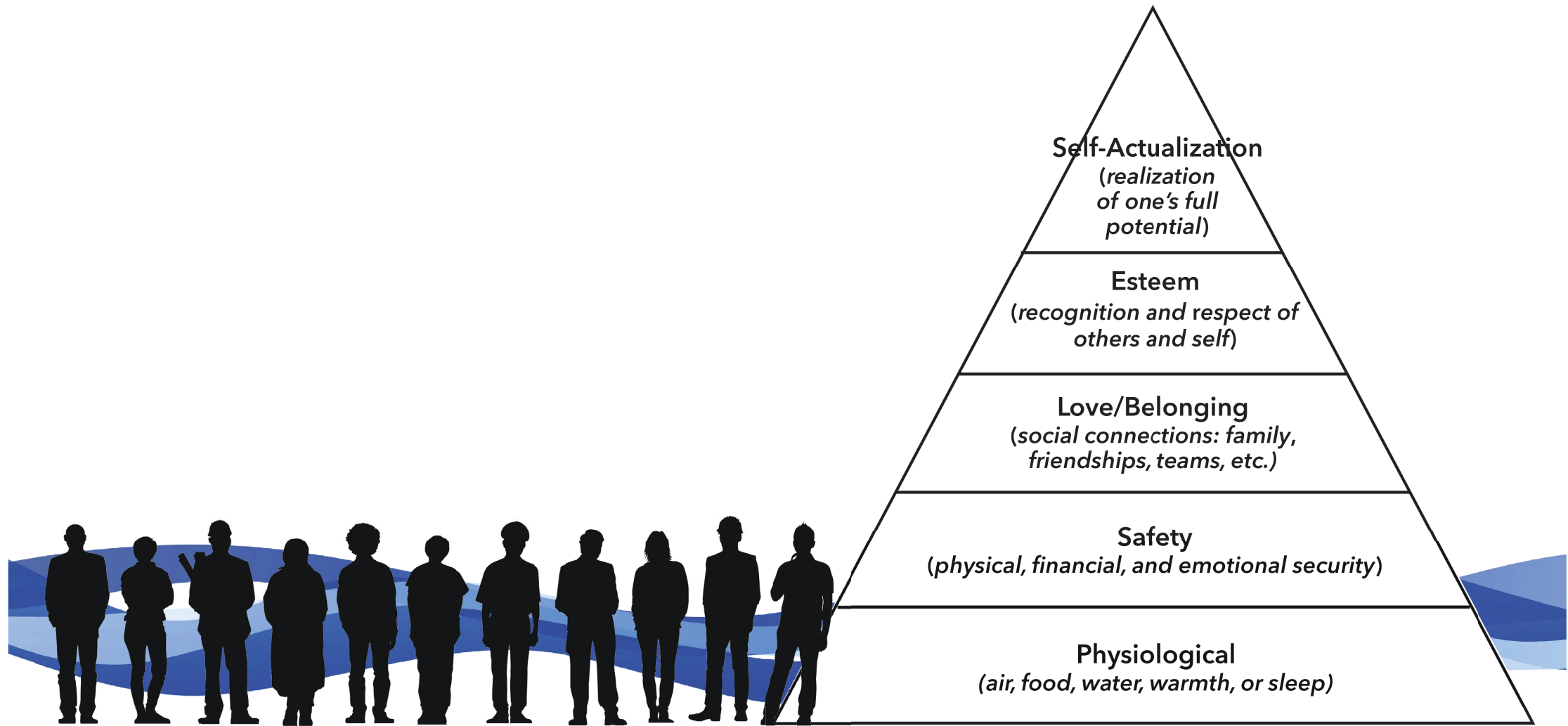
**IMPACT:**

- Groups/Teams (employees, public, contractors, etc.)
- Infrastructure (systems, processes, procedures, facilities, resources)
- Efforts (goals, projects, initiatives, etc.)

# COMPREHENSIVE: PHYSICAL & PSYCHOLOGICAL SAFETY



*Psychological Safety is the belief that your voice, and every person's voice is both welcomed and valued, and that work-related concerns, ideas, or questions can be raised without fear of embarrassment, punishment, or other negative outcomes.*



# Maslow's Hierarchy of Human Needs

# THE ABSENCE OF WORKPLACE SAFETY

## *and the feeling of THREAT*



The absence of physical or psychological safety or security (perceived or actual) creates the feeling of **threat**.

Our brains respond to threat in one of 3 ways, fight, flight, or freeze.  
We are wired that way.

**WHAT might psychological threat look like in the workplace?**

# PSYCHOLOGICAL SAFETY



Physical and Psychological  
SAFETY

Promotes and increases:

- Engagement and ownership.
- Team collaboration and strength.
- Speaking up and ask questions.
- Ideas, creativity and innovation.
- Productivity.

# PSYCHOLOGICAL SAFETY



Physical and Psychological  
SAFETY

Is not meant to:

- Undermine performance expectations.
- Exclude accountability.
- Promote favoritism.
- Exclude redirecting performance (or corrective actions).



**Foster trust:** Communicate openly, listen well, keep your word, get to know your team, and make time for them.

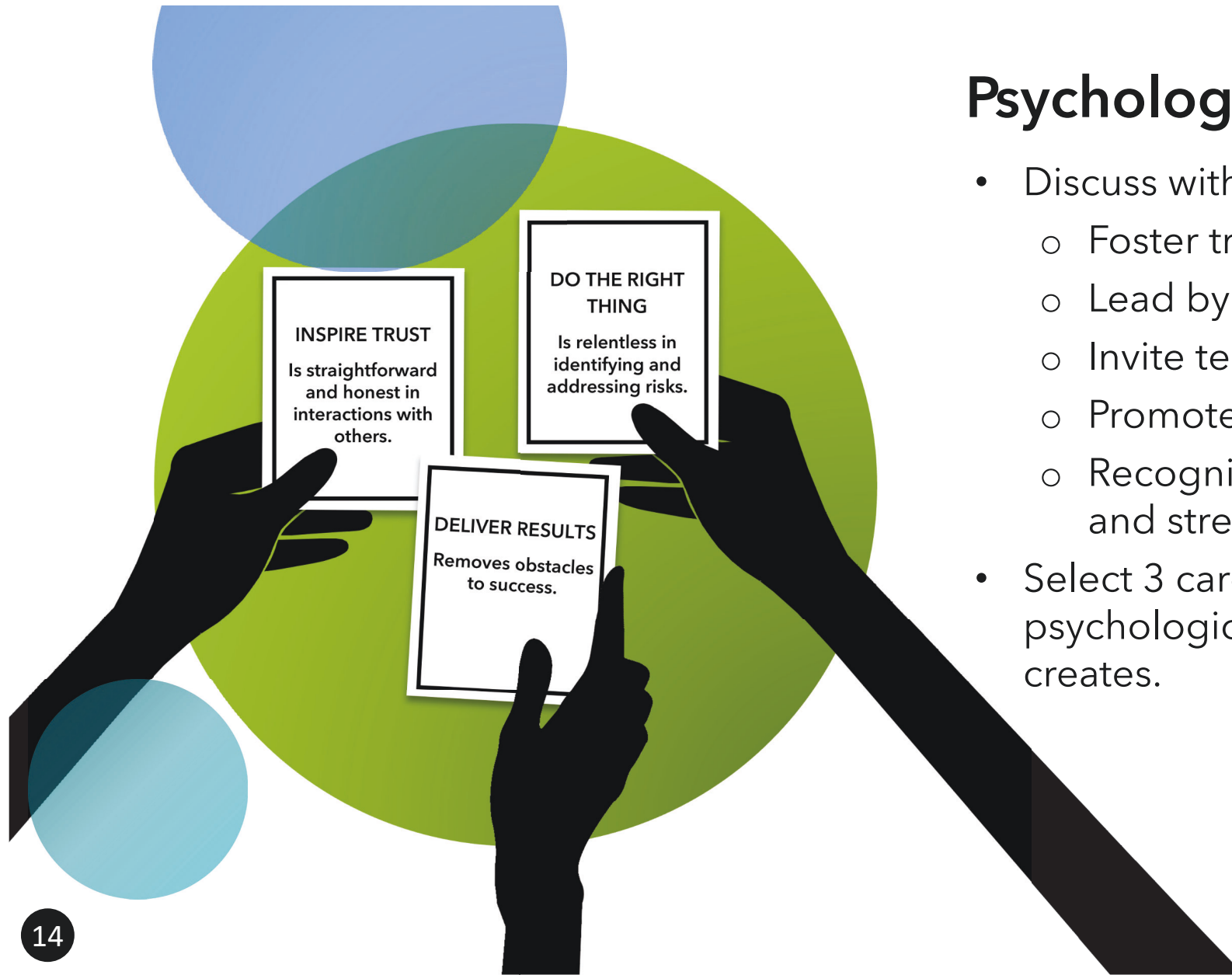
**Lead by example:** Demonstrate asking questions, raising concerns, and talk through issues in a constructive and nonjudgmental manner, and acknowledge your mistakes.

**Invite team members to share** ideas and solutions, ask questions, and raise tough issues.

**Promote learning from mistakes** and use lessons learned to shape a comprehensive view of the workflow.

**Recognize and make space for unique skills and strengths** of all team members.

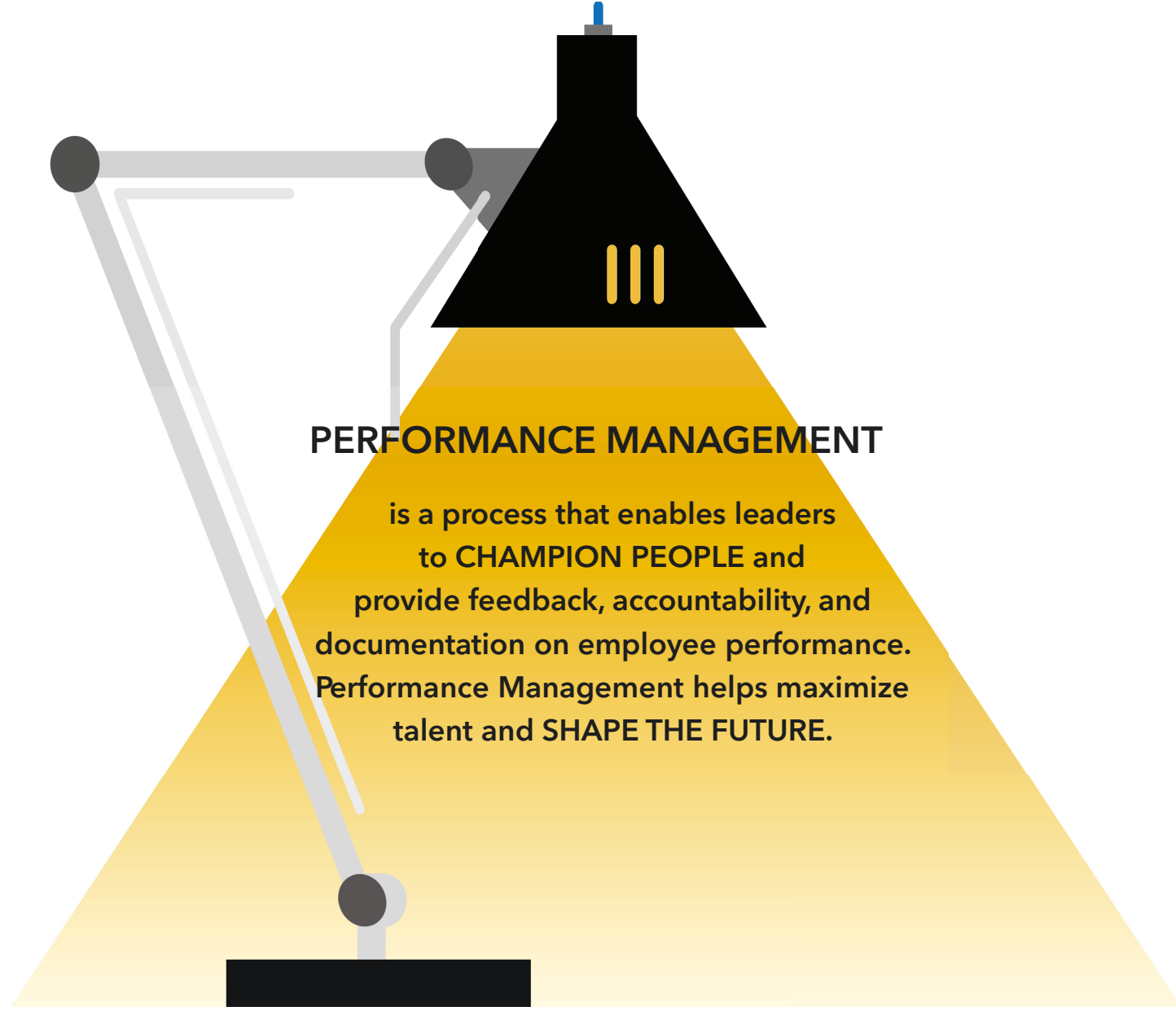




## Psychological Safety

- Discuss with your Catalyst Partner:
  - Foster trust.
  - Lead by example.
  - Invite team members to share.
  - Promote learning from mistakes.
  - Recognize/make space for skills and strengths.
- Select 3 cards critical to building psychological safety and the results it creates.

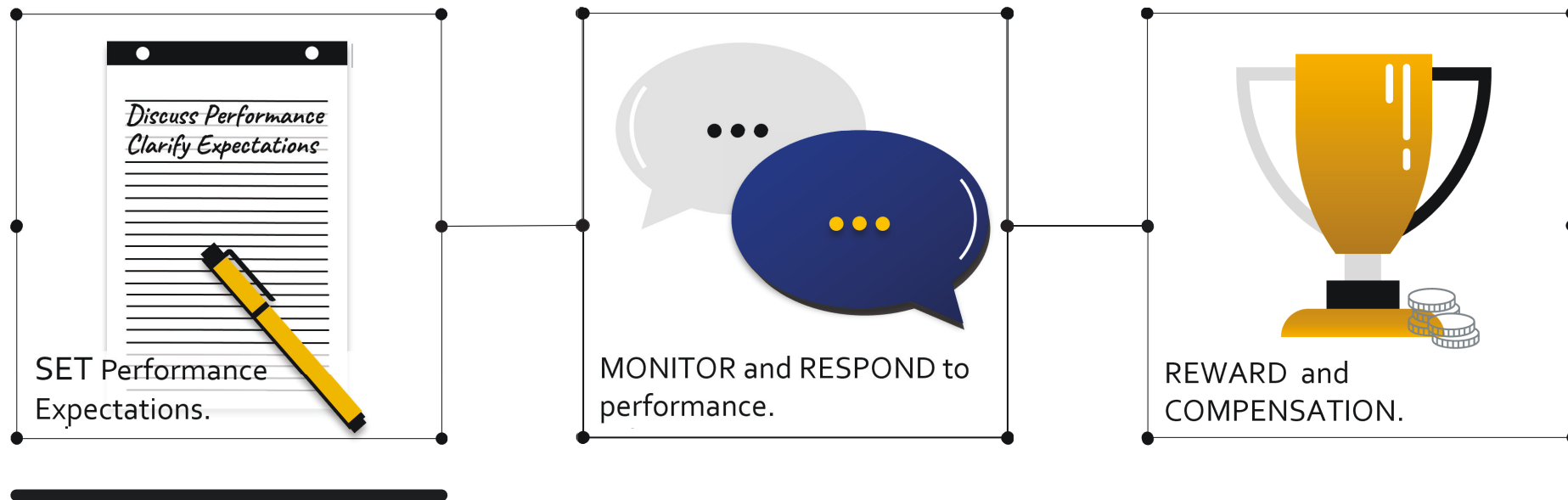




**What do you need  
performance management to accomplish?**

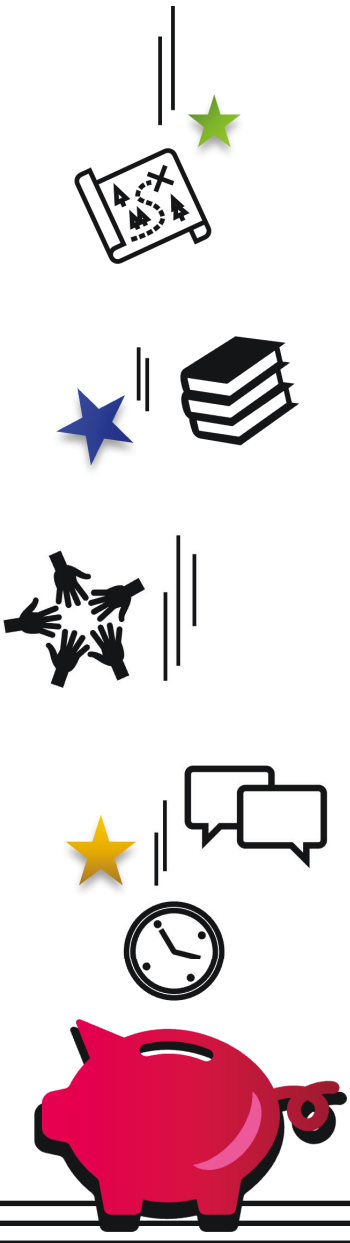


# COMPONENTS OF PERFORMANCE MANAGEMENT



How do you ensure employees are aware of, and understanding, their performance expectations?

Including, how performance will be measured and what success looks like?



# SoCalGas PERFORMANCE EXPECTATIONS



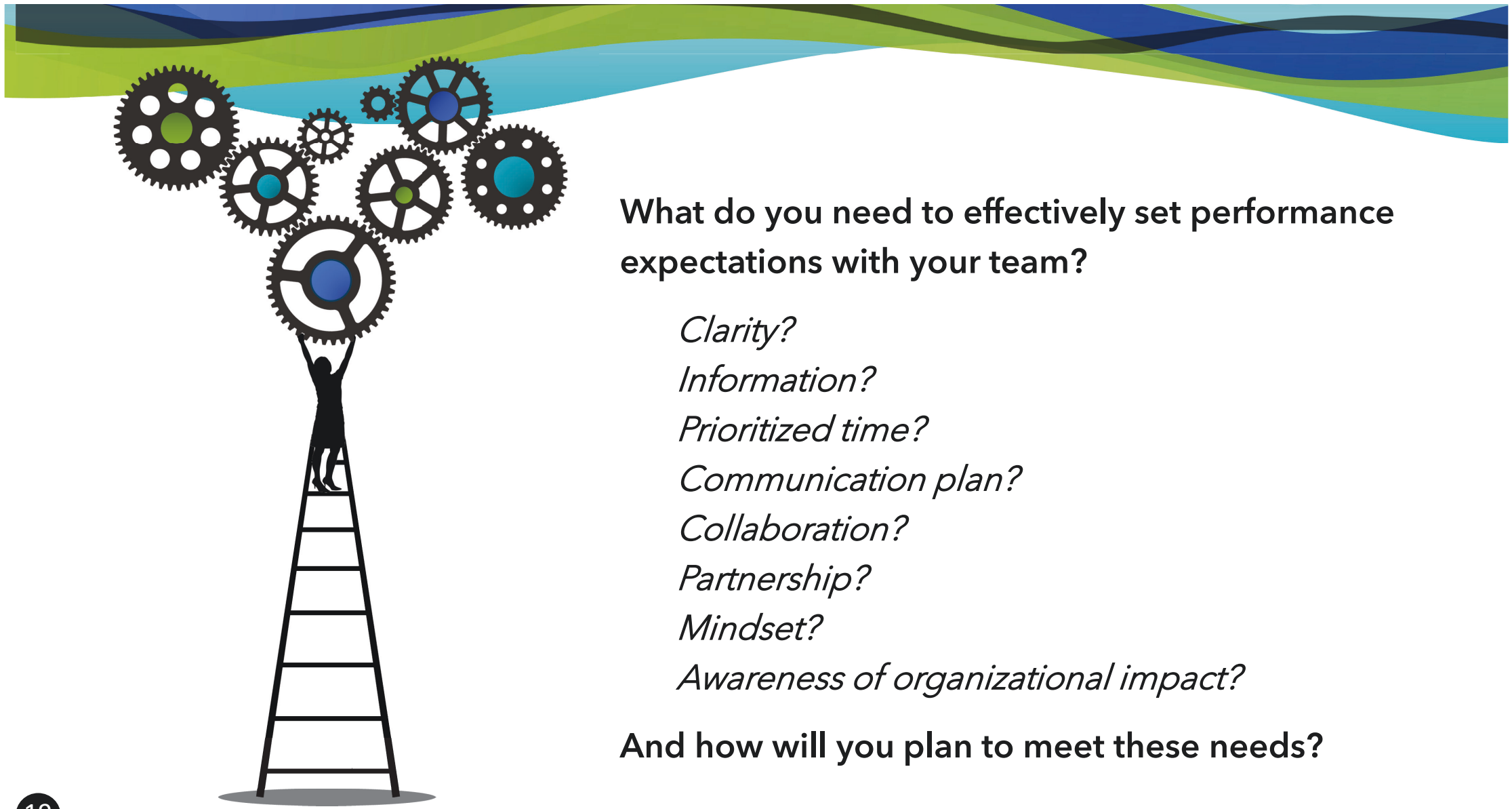
What's most important about setting expectations and leading performance success, is knowing how behaviors define and drive performance success and ratings.

# SoCalGas PERFORMANCE EXPECTATIONS & BEHAVIORS



1. Think about the expectations of your team.
2. What actions and qualities are needed to execute performance expectations successfully.
3. Note the actions and qualities you expect to see in two Appraisal categories:
  - 1st Category: Safety
  - 2nd Category: Your choice
  - Describe the actions and qualities of *Strong Satisfactory* performance. And in comparison, *what does Weak Satisfactory* actions/qualities look like?





What do you need to effectively set performance expectations with your team?

*Clarity?*

*Information?*

*Prioritized time?*

*Communication plan?*

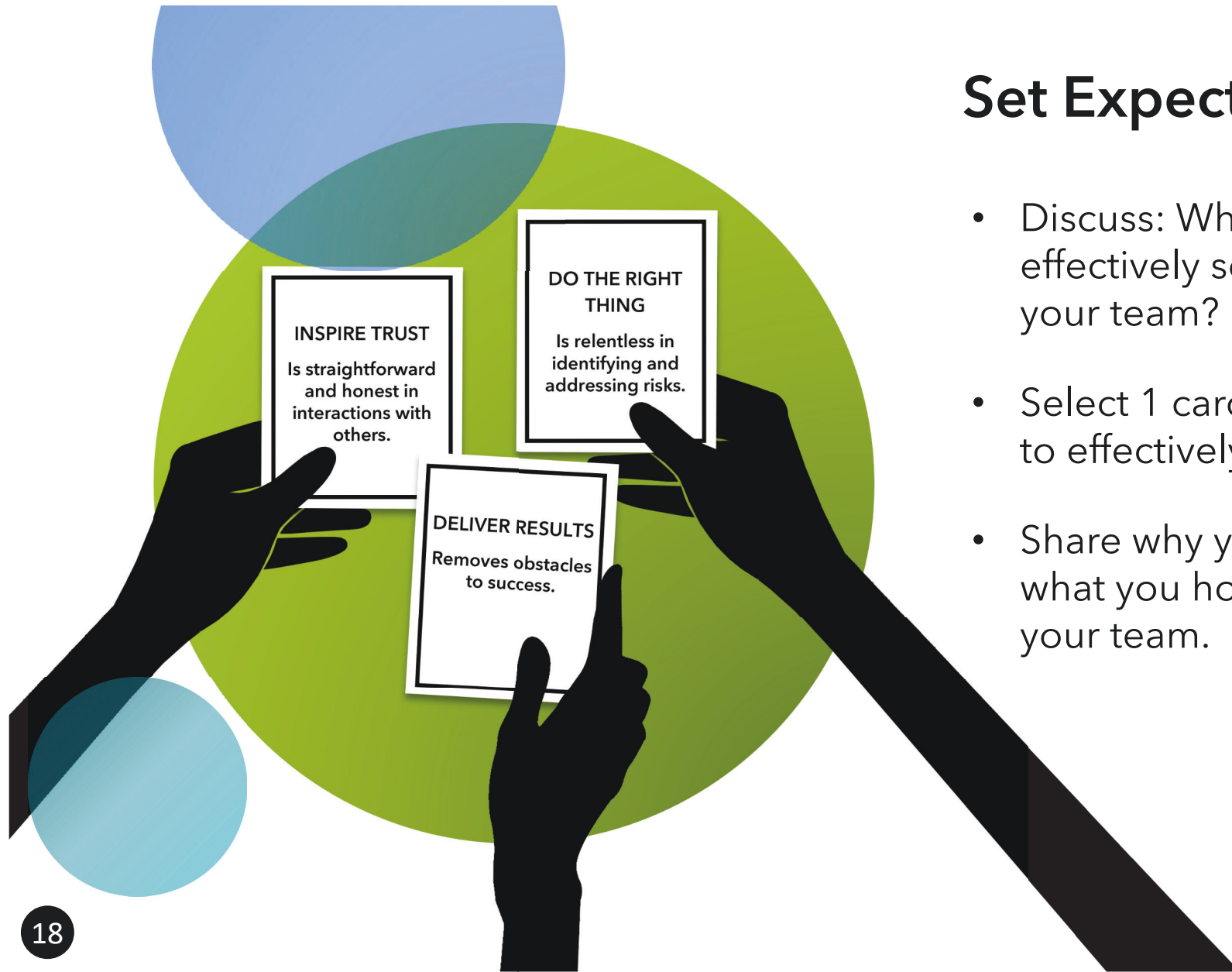
*Collaboration?*

*Partnership?*

*Mindset?*

*Awareness of organizational impact?*

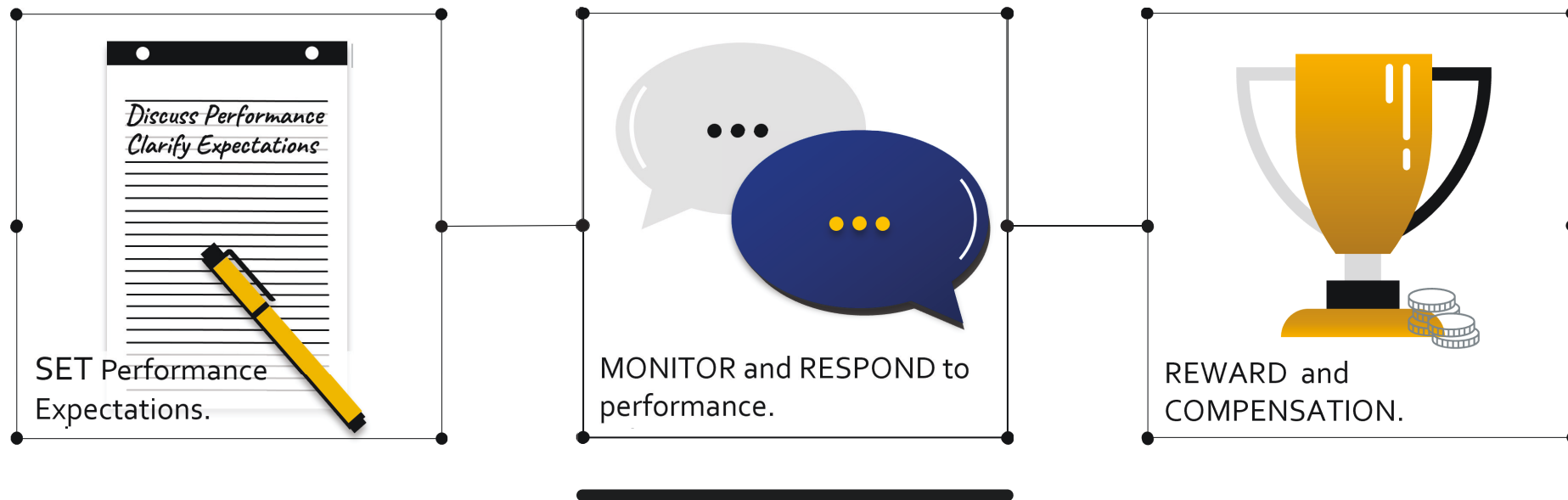
And how will you plan to meet these needs?



## Set Expectations

- Discuss: What do YOU need to effectively set expectations with your team?
- Select 1 card you (individually) need to effectively set expectations.
- Share why you selected the card, and what you hope the affect will be on your team.

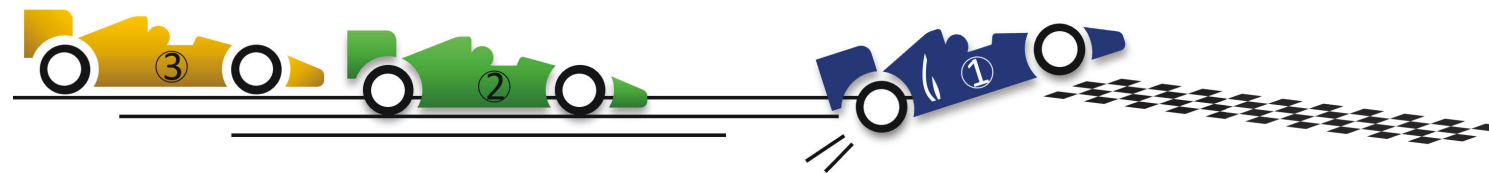
# COMPONENTS OF PERFORMANCE MANAGEMENT



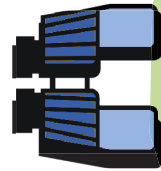
How do you know performance expectations are going as planned?



What methods do you use to track the progress of an employee's performance?



**Monitoring  
Performance**  
is as much  
about reinforcing  
as it is about  
redirecting.



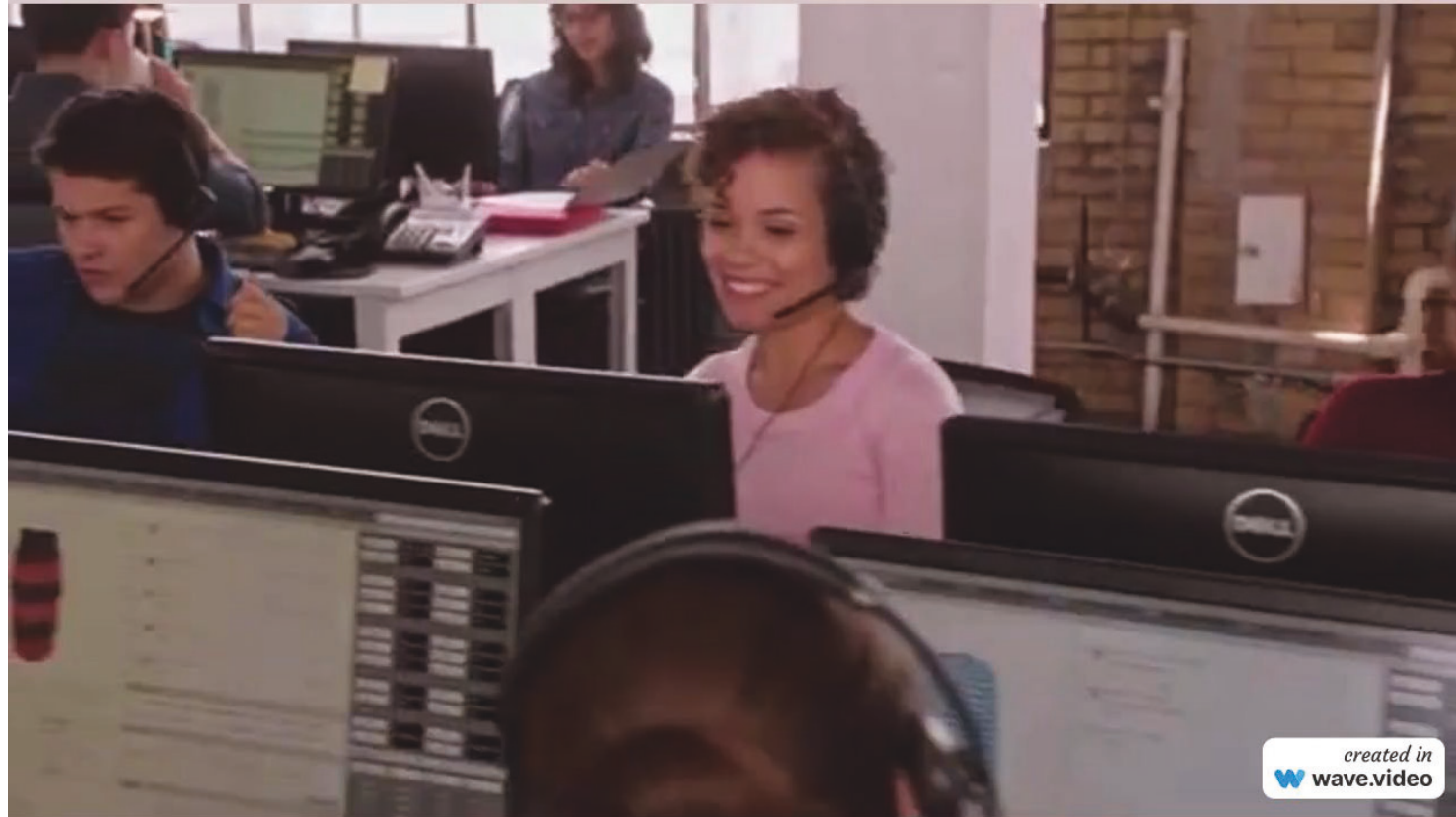
- Work is successful -or- unsuccessful.
- Work is consistently on time -or- at risk of falling behind.
- Demonstrates safety (physically -and- psychologically).
- Often attends meetings prepared -or- unprepared.
- Delivers high quality work -or- doesn't.
- Often appears engaged -or- appears disengaged.
- Finds time to support/help others.
- Communicates with clarity and timeliness -or- doesn't.
- Shares ideas or forward-facing insights (innovative).

## **PERFORMANCE EXPECTATION:**

Manage Escalated Client Queue

## **DESCRIPTION:**

- Respond to elevated-queue calls,
- Resolve client inquiries and concerns,
- Minimize return calls, and
- Meet average handle time (AHT) and resolution forecast at 63%.



## **PERFORMANCE EXPECTATION:**

Lead Reduction in Force/Layoff Sessions

## **DESCRIPTION:**

- Facilitate layoff events including,
- Following compliance requirements,
- Calculating severance benefits,
- Preparing separation packet, and
- Conducting layoff meeting,  
while ensuring employee care and well being.









## HUMAN and ORG PERFORMANCE

- People are fallible, and even the best make mistakes.
- Context drives actions and behaviors.
- Leadership's response to failure matters.
- Blame fixes nothing.
- Improvement happens through learning.



## LEARNING MINDSET

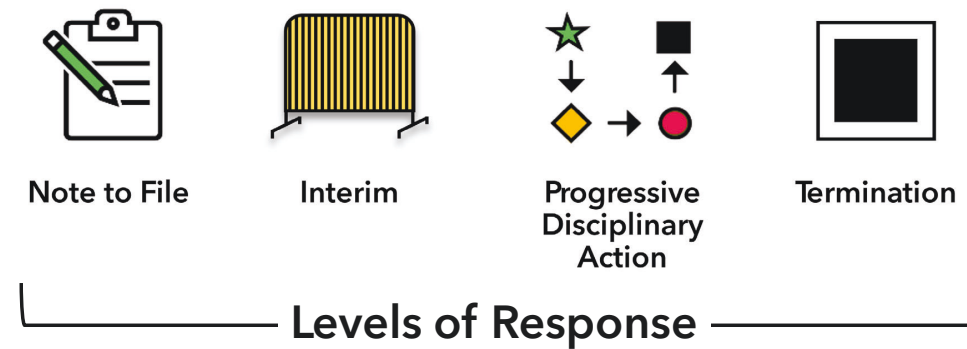
- Gain insights from the employee by asking about the decisions they made, and why they made them.
- Examine the external factors that may have influenced the action/behavior.
- Identify opportunities to shed more light on the behavior/ circumstance.
- Problem-solve and identify solutions with the employee.

*A learning mindset not only helps to more accurately identify cause and solutions, but also increases psychological safety.*

# QUESTION

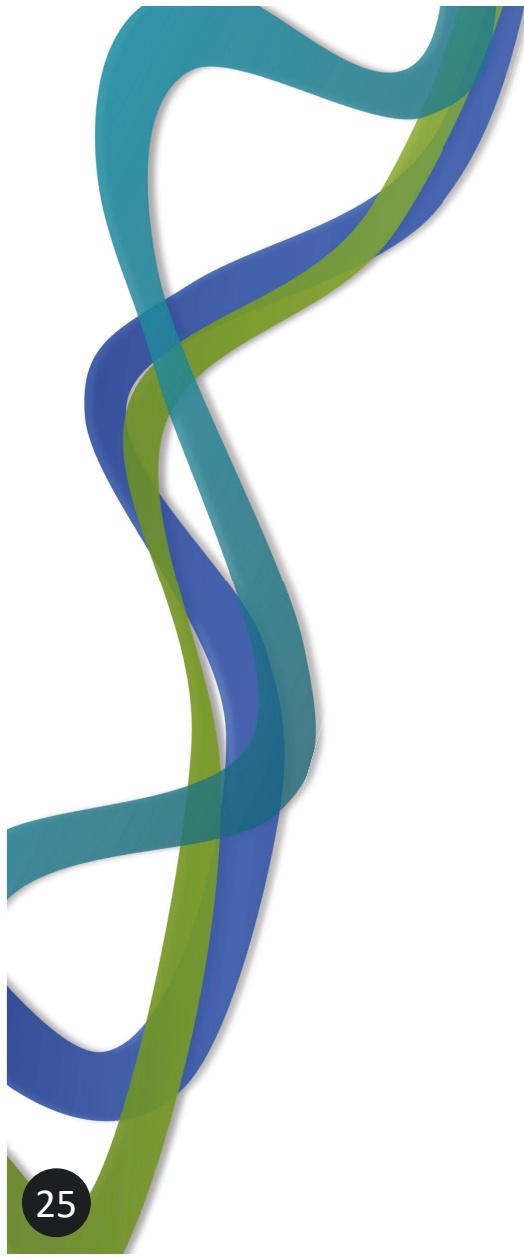
**What's at risk if LOW performance is not addressed?**

# LOW PERFORMANCE



# LOW PERFORMANCE Q&A

1. Review Low Performance content on pages 22-24 of your Participant Guide.
2. At your table, identify one (1) question your group would like answered regarding the Low Performance process.
3. Write your table's question on the flipchart.

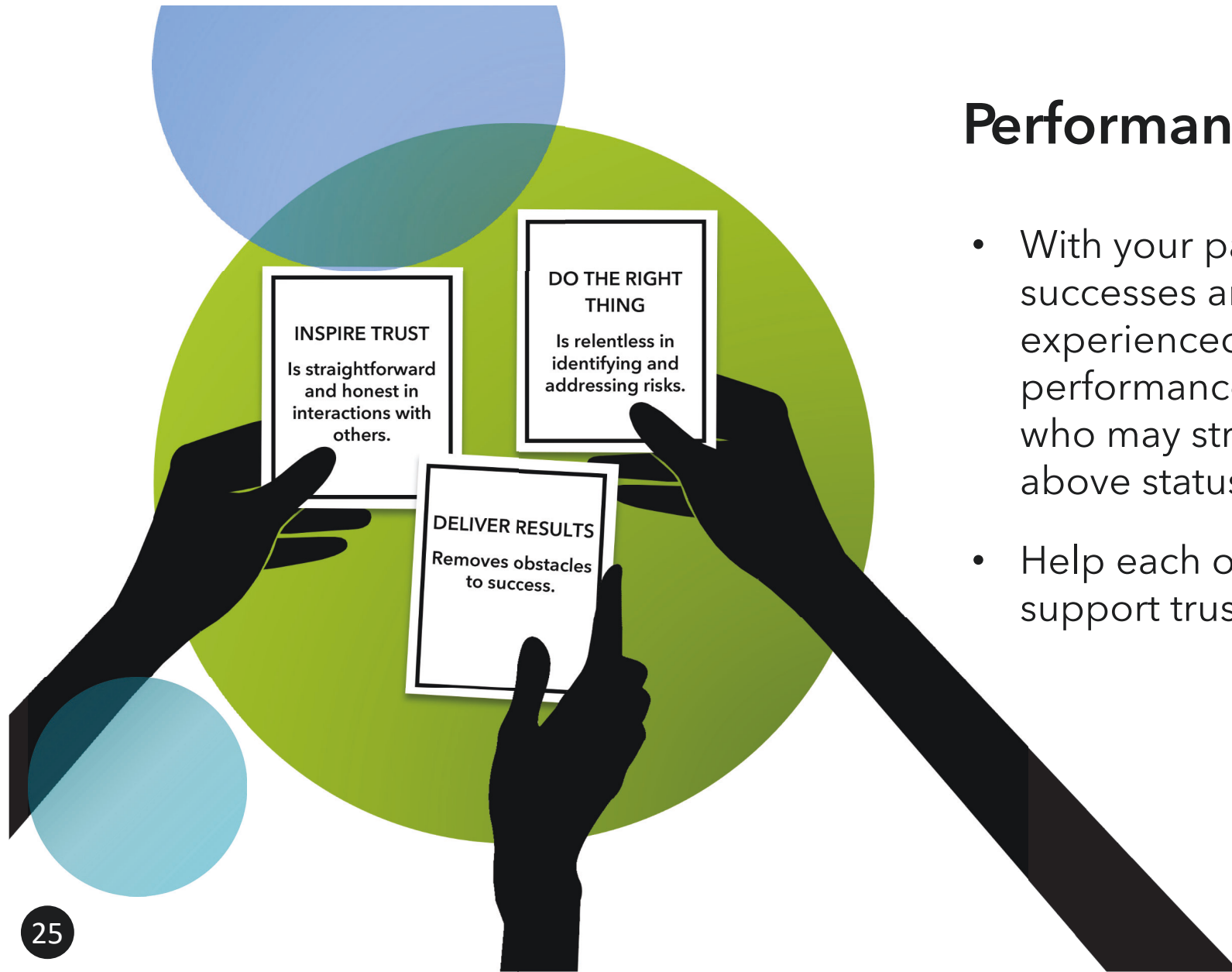


# CARE ► TRUST ► INFLUENCE

Taking advice to heart requires  
we trust the person giving the advice.

Even when that person is our leader.





## Performance Influence

- With your partner, discuss the successes and obstacles you have experienced when leading low performance employees...or those who may struggle with performing above status quo.
- Help each other select a card to support trust to influence.

# QUESTION

What's at risk if HIGH performance is not addressed?

# Addressing **HIGH** Performance

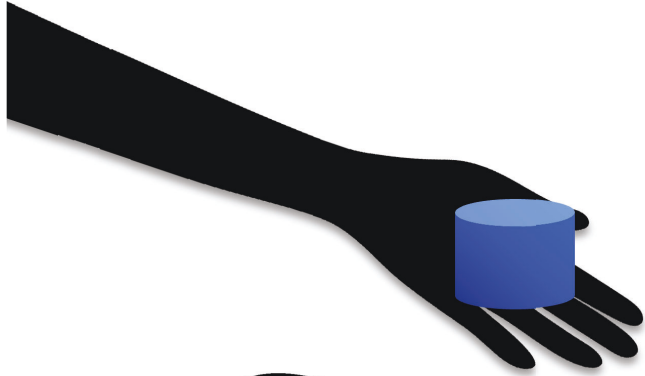




BELONGING happens when an employee can contribute authentically to the team and organization AND trust their contributions are valued.

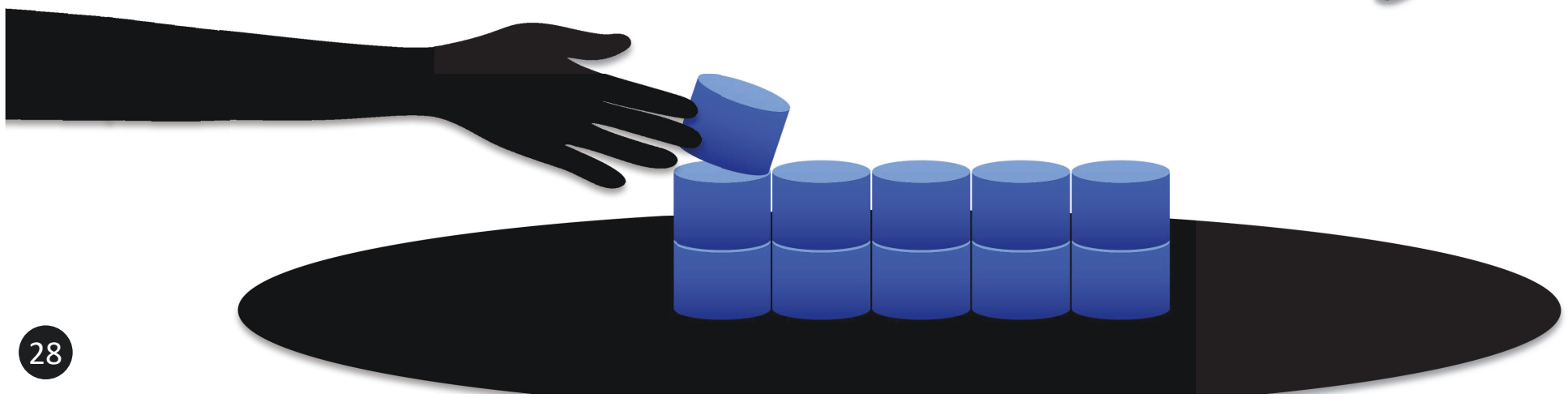
It enables employees to feel they fit into the big picture, contribute to the vision AND understand how their individual talents and strengths can support it.

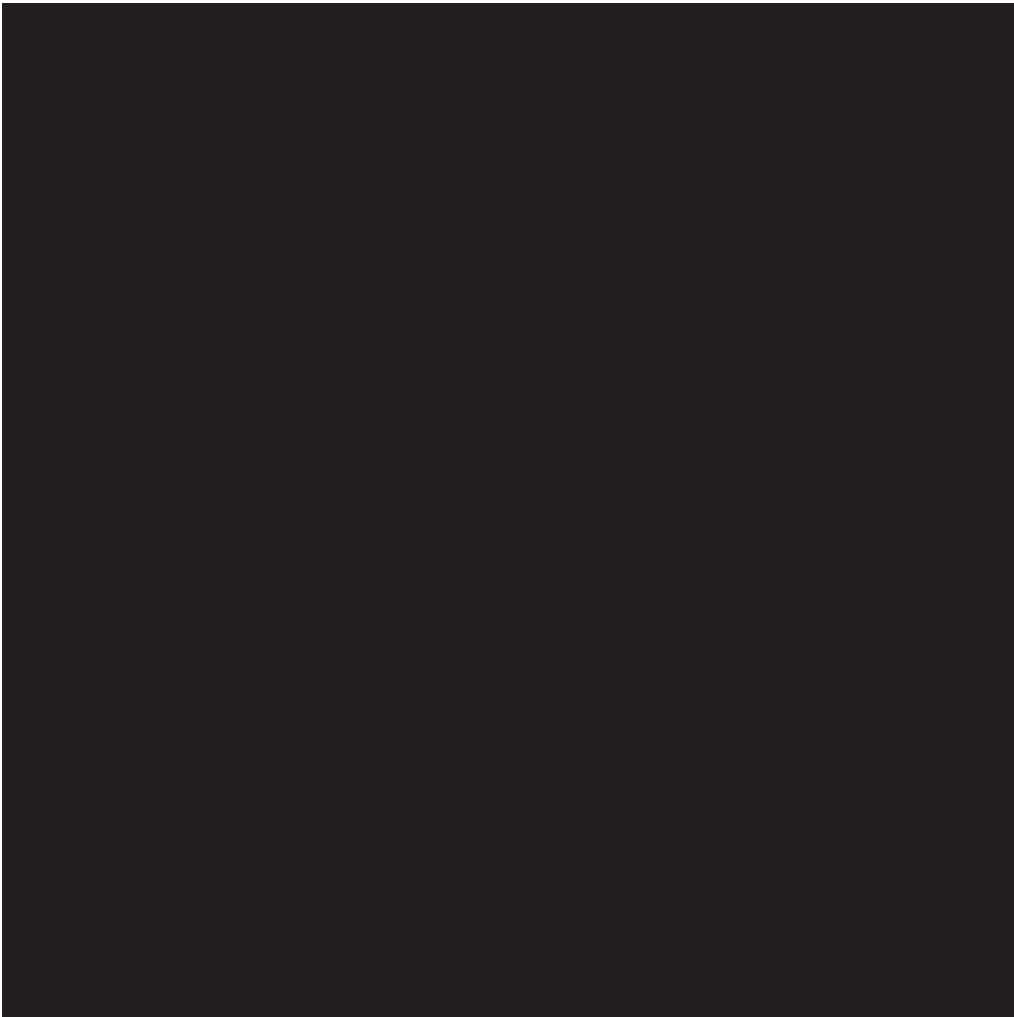




*"The greatest barrier to belonging is fitting in"*

-Brene Brown

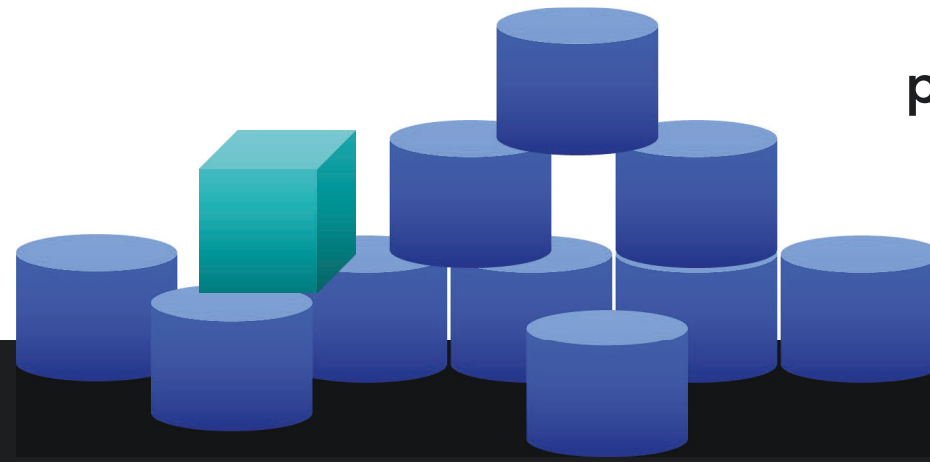




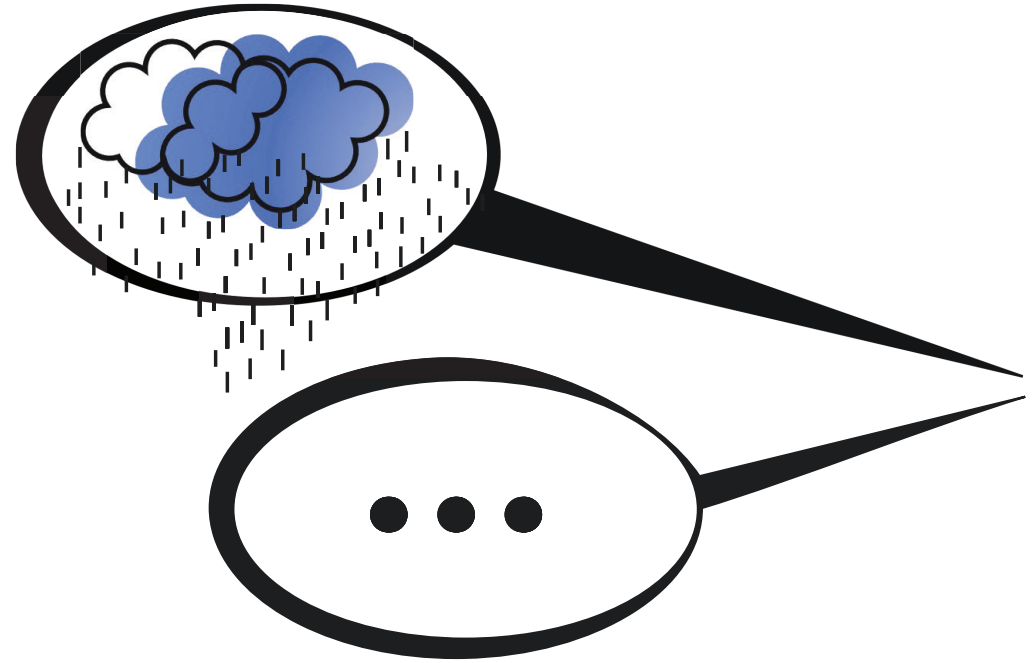
# FOSTERING BELONGING

When the culture makes space for people to bring their unique strengths and perspectives to the table, we begin to reach goals and exceed expectations as a team.

What are the practical ways to create a sense of belonging on a team?

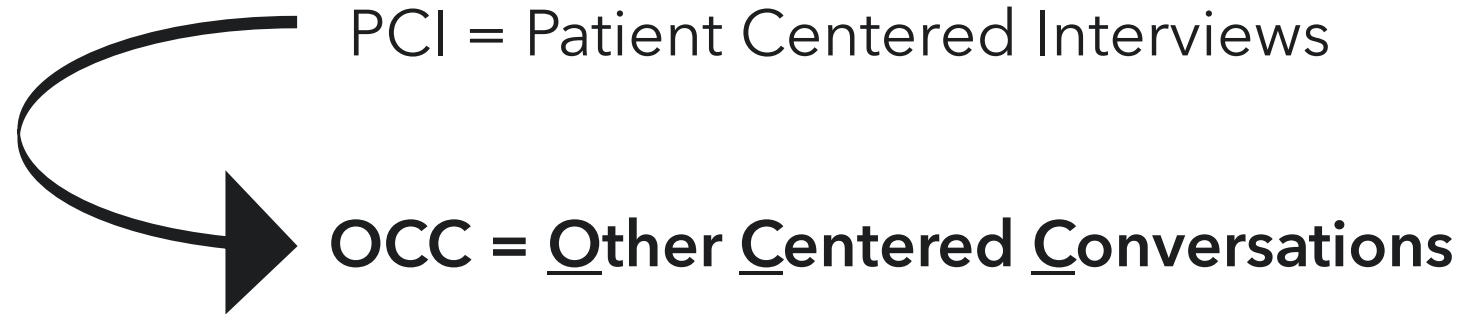






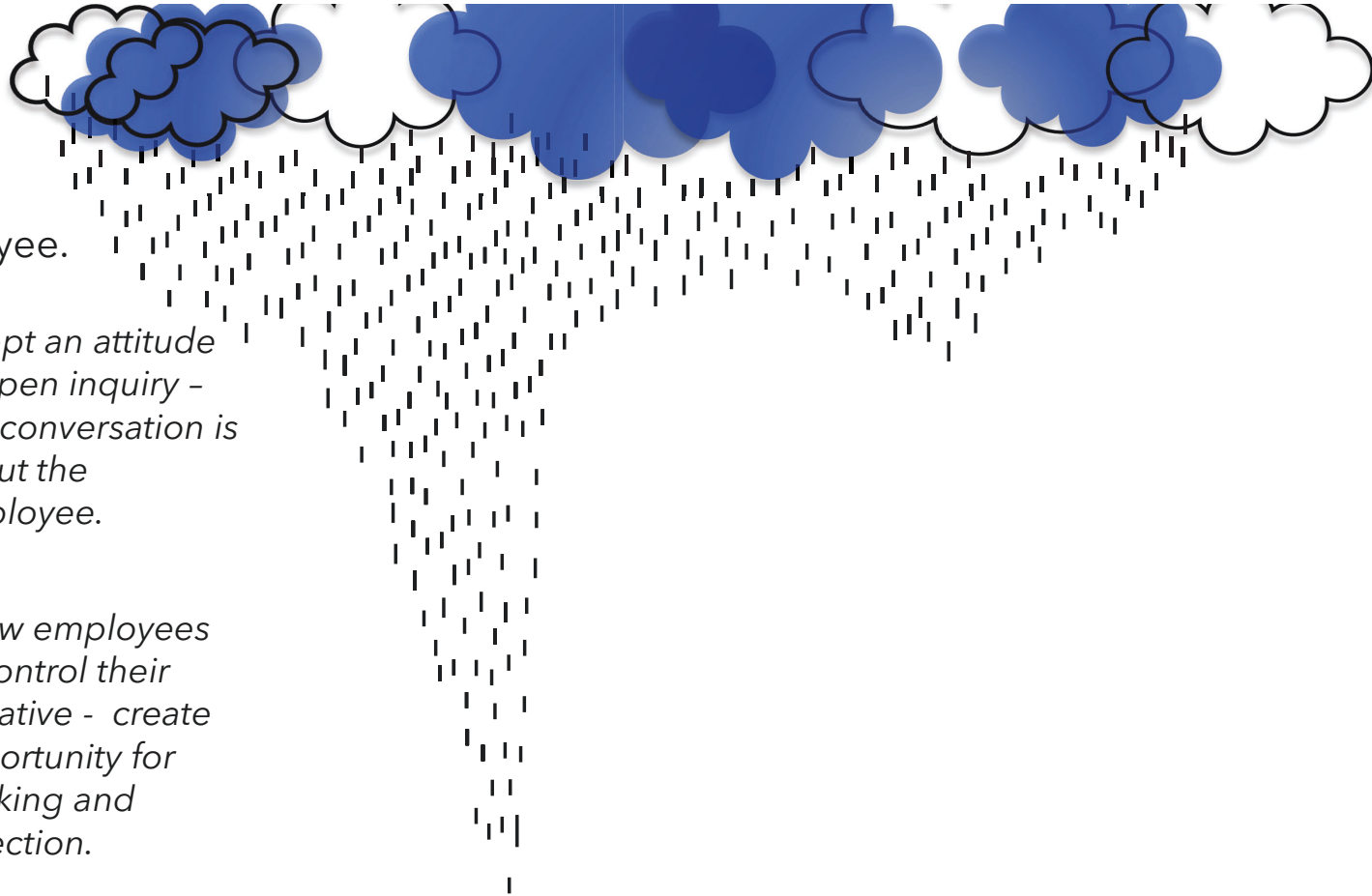
**30 HIGH STAKES CONVERSATIONS**

APPENDIX J-80



The **OCC** experience creates a safe place for employees to think about and share:

- Ideas about what is happening with their performance, and
- Their feelings about their performance, especially their fears/concerns/challenges.
- The impact of their behavior/actions on their performance.
- Their expectations about what should be done.



**OCC** is about the employee.

**Commit to putting thoughts, conclusions, and judgements, on hold.**

*Adopt an attitude of open inquiry - this conversation is about the employee.*

**Ask open-ended questions**

*Allow employees to control their narrative - create opportunity for thinking and reflection.*

**Allow for silence**

*Give time to think and reflect.*



**OCC** is about the employee.

**Commit to putting thoughts, conclusions, and judgements, on hold.**

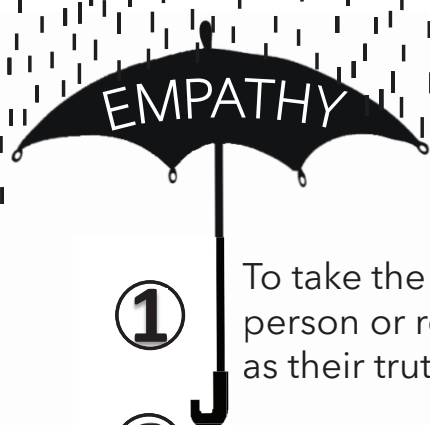
*Adopt an attitude of open inquiry - this conversation is about the employee.*

**Ask open-ended questions**

*Allow employees to control their narrative - create opportunity for thinking and reflection.*

**Allow for silence**

*Give time to think and reflect.*



①

To take the perspective of another person or recognize their perspective as their truth.

②

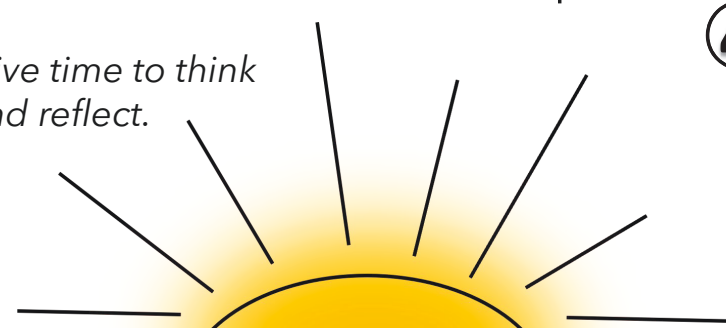
Stay out of judgment.

③

Recognize emotion in other people and communicate it.

④

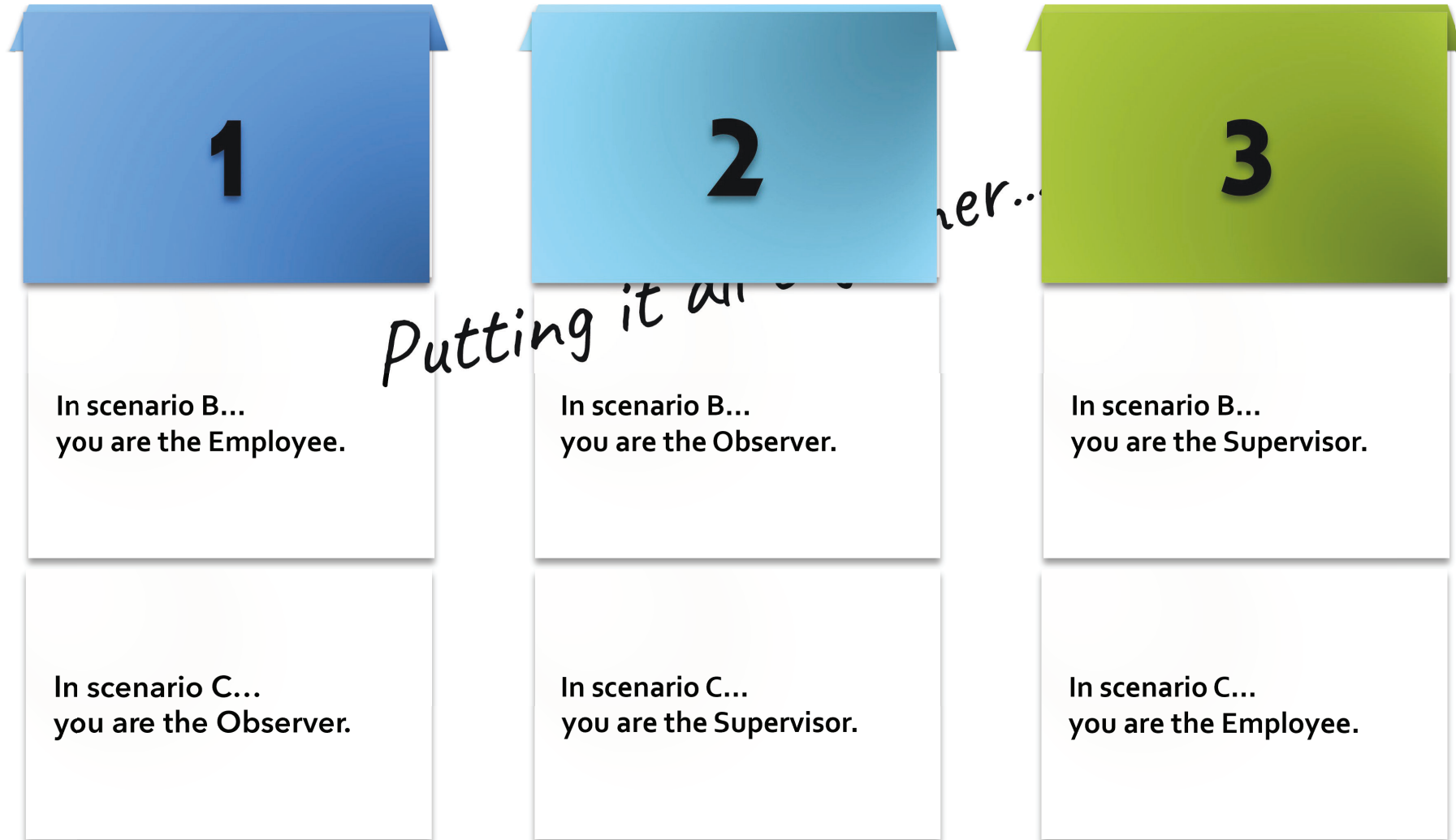
Feel WITH people.



To **PREPARE** your thinking and mindset:

- Minimize distractions and be fully present.
- Examine your thoughts and feelings about the employee and conversation.
- Suspend your judgement and expand belonging.
- Be aware of possible blind spots you may have to be focused on the employee and the circumstance.
- Be willing to ask questions and fully explore the factors that may have influenced the employee's thinking/actions.
- Be of the mindset that all people make mistakes.





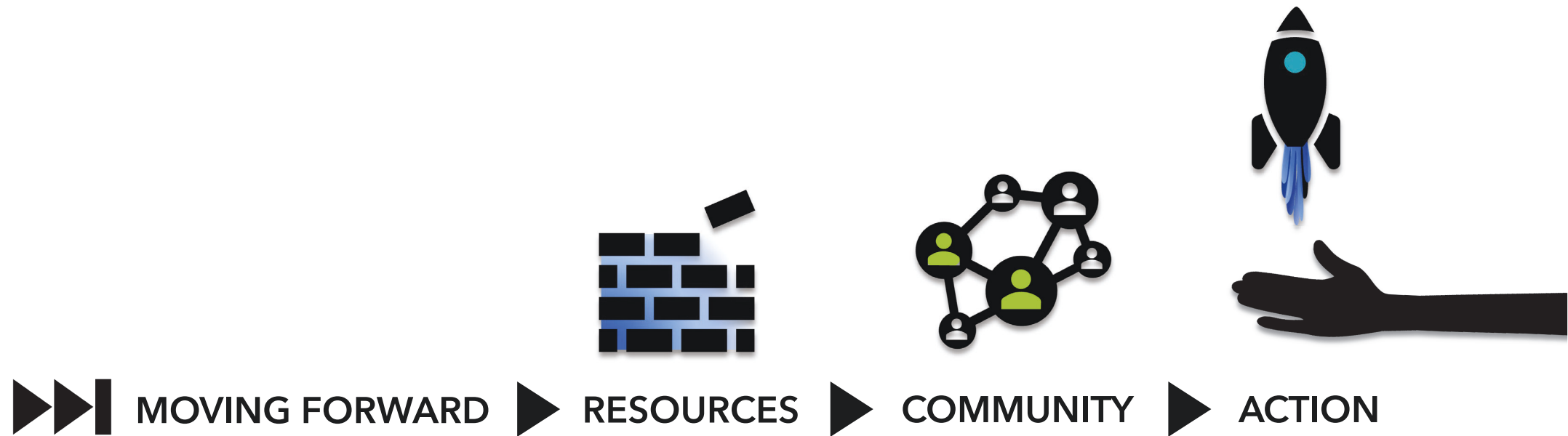
What are the culture investments  
you will make?







- What 3-5 Catalyst cards will you be your primary focus?
- What actions will you take to implement these behaviors and/or competencies?
- What do you hope your team will experience as a result?
- How do you expect your team culture will evolve and support the aspirational org culture?
- How will the current org culture support or challenge your team culture changes? What changes can you make or influence?
- What personal adjustments will you make? (Time, mindset, communication, connection, etc.)
- What other Catalyst cards will support safety and performance?



- Schedule conversations with your Catalyst Partner x3.
- Meet with your leader to share your Team Culture Plan.
- Meet with your team/direct reports to share your Team Culture Plan, invite their insights on the team's current culture...and their suggestions for evolving to the aspirational culture.
- Create a Leadership Catalyst Goal - track progress and discuss during Touchpoint conversations.



Leadership  
Catalyst



**Thank you for attending the  
Leadership Catalyst class!**

**Following this class, you will be sent a post-course  
survey or you can find it here.**

**Thank you!**