

APPENDIX F

Initiative 1C: REPRESENTED EMPLOYEE DIALOGUES

Q1 2024 – Q3 2024

1.0 PROJECT SUMMARY

1.1 Objective

From March 2024 to May 2024, the Safety Organization partnered with safety leaders across SoCalGas to facilitate dialogues with represented employees to explore and achieve the following:

- Embrace transparency and encourage honest dialogue
- Increase organizational understanding of traits that drive the areas in need of attention identified in the 2EC Report.
- Gather insights and brainstorm on improvement opportunities.

Conclusions and recommendations from the 2EC Report were reviewed and considered in determining the structure and purpose of the dialogues and developing process and outcome measures to track success and progress.

Sample relevant 2EC Report conclusions included the following:

- Leaders clearly espouse the value of safety generally, though clearly mostly emphasizing personnel safety.
- Reward systems have an emphasis on personnel safety and use lagging indicators to assess safety performance. They do not seem to integrate public and security risk into their messages, measurements, or rewards.
- Safety is conceptualized narrowly, and interviewees talked almost exclusively about personnel safety. While the organization may espouse a broad conception of safety culture, that view has not been internalized by people in the organization.
- Less of the training, meetings, and messages consider public and security risks.
- Little upward communication exists to identify field-based experiences that create potential public risks.

Relevant 2EC Report recommendations included the following:

- Conduct dialogue sessions with all levels in the organization to create a shared understanding of the assessment results¹ and what comprehensive safety means for each business and organizational unit. The objective of these sessions would be twofold:
 - Self-reflection of the culture based on the results
 - Capture the organization's intelligence and creativity on how to recover the areas in need of attention. Action items should result from the dialogue sessions that will meet the objectives of the sessions.

¹ The finding of the 2EC Report were used to inform open-ended and exploratory dialogue prompts. SoCalGas is also engaged in enterprise-wide activities to occur alongside the dialogues to support a broader shared understanding of the assessment results.

The recommendations gathered from the management employee dialogues conducted during Q3-Q4 of 2023 were utilized to refine and enhance the planning, scheduling, facilitation, and notetaking processes for the represented employee dialogues. The recommendations were formulated by incorporating feedback from multiple sources, including participant post-dialogue surveys, observations from sessions with 2EC, feedback from facilitators, and insights provided by the Organizational Effectiveness team.

Additionally, SoCalGas collaborated with 2EC in a total of 15 out of the 47 dialogue sessions. During these sessions, the SoCalGas facilitation team took on different roles: either assuming the responsibility of notetaking to observe 2EC in the main facilitator role, or directly assuming the main facilitator role. SoCalGas leveraged this collaboration as an opportunity to learn from 2EC's expertise and experiences. The feedback received on facilitation and notetaking from these collaborative sessions was incorporated into the subsequent sessions, ensuring continuous refinement throughout the entire process.

Following completion of the dialogues, the Safety Organization partnered with SoCalGas' Organizational Effectiveness team to review and analyze approximately 3,000 comments collected from 47 dialogue sessions. To ensure anonymity, participants were assured that no individual names would be included when reporting the themes and findings from the dialogues. In addition, optional anonymous post-dialogue surveys were conducted to gather further insights into participants' understanding of comprehensive safety, their role in safety, the quality of the dialogues, and to collect valuable employee feedback on potential improvements for future sessions.

1.2 Summary Results

<i>Metric/Indicators</i>	<i>Results</i>
# of Employees in Attendance % of Employee Attendance	568 employees randomly selected and invited; 328 employees accepted invitation. 51 employees separately volunteered beyond the formal invitations. Total 379 employees scheduled, and 339 employees participated (7.3% of represented employee population). ² Notably, all 18 departments were represented in the dialogue sessions
# of Dialogues Completed	47 Dialogues Completed
Saturation Analysis	SoCalGas' Organizational Effectiveness team statistically analyzed the saturation of the themes. It was found that when using the most conservative saturation analysis, a 0% saturation ratio was reached by session 16. By session 3, 23

² Please note: some of the 339 participants were separate from the 379 invited. In some instances, employees opted to not attend the day of the dialogue. Instead, other employees were asked to attend the day of the dialogue and chose to participate.

	<p>out of the 27 themes were identified. The last theme was identified in session 31 of 47 total sessions. Although additional themes may develop if additional dialogues are conducted, this analysis shows that a point of diminishing returns was reached when speaking with 7.3% of the represented employee population.</p>
<p>Qualitative analysis of dialogue transparency and openness</p>	<p>Based on survey results from dialogue participants, feedback from facilitators, and Organizational Effectiveness’s analysis of the comments, it is believed that the represented employee dialogues promoted a shared space³ where employees felt psychologically safe to share their opinions and beliefs. In addition to direct feedback received by participants who completed the post-dialogue survey, facilitators also observed that most participants were not hesitant to voice their opinions, concerns, ideas, or answer questions during the sessions.</p> <p><i>A complete analysis of the dialogue session notes is detailed within this report in Section 3.</i></p>
<p>Qualitative analysis of information gathered to support understanding of culture and the 2EC Report</p>	<p>27 themes were identified after analyzing notes from the dialogues. The following concepts and themes highlight barriers, challenges, and opportunities identified by management employees. They also provide organizational insight into forces and factors that drive and influence safety culture at SoCalGas.</p> <p><i>A complete analysis of the dialogue session notes is detailed within this report in Section 3.</i></p>
<p>Qualitative analysis of learnings and ideas identified on how to improve</p>	<p>The themes, learnings, and takeaways from the represented employee dialogues were integrated into SoCalGas’s Safety Culture Improvement Plan co-creation process. In this way, the 27 themes and related suggestions could be incorporated into an actionable plan. This approach allowed for a more systemic way to change and improve issues identified in these dialogues. Please see table in “Goal: Gather insights and brainstorm on improvement opportunities.”</p>

³ A “shared space” is characterized by mutual respect, curiosity of different perspectives, openness and sharing of views and beliefs without fear of blame, exclusion, or retaliation.

Goal: Gather insights and brainstorm on improvement opportunities.

Dialogues provided data on employees’ current understanding of comprehensive safety, employees’ current thoughts on the role they play in advancing and supporting safety and provide insight into challenges that impact safety and opinions and beliefs on current SoCalGas safety culture.

SoCalGas used the insights and identified improvement opportunities from these dialogues, coupled with other dialogue activities, to inform and influence its revised safety culture improvement plan. As an initial effort and to connect the dialogue insights and improvements to the 2EC Report, SoCalGas analyzed the dialogues to inform how best to advance and understand recommendations contained in the 2EC Report.

2EC Report Recommendation	Dialogue Insights and Improvements
<p>“Establish methods for managers to enhance the understanding, skills and enactment on how their leadership can influence the safety culture positively e.g. empowerment, listening rather than telling, learner mind-set.”</p>	<p>When thinking about methods for supervisors and managers to enhance and influence safety culture, dialogue participants identified several suggestions:</p> <ul style="list-style-type: none"> • More consistency, and alignment in supervisor/management actions. • More consistency in the application of procedures and practices across regions. • Desire for more involvement and collaboration in decision-making. • Leaders to be more knowledgeable about safety. • Desire for more open communication and transparency around safety. Improve information sharing, transparency, and timeliness of communication. • Enhance supervisor expertise, experience, and development. • Less micromanagement and excessive focus on metrics.
<p>“Analyze the resource allocations and competence levels to assure safety and reliability.”</p>	<p>The represented employee dialogues have provided information that can help inform and shape the future resource allocation review. Specifically:</p> <ul style="list-style-type: none"> • Analyze resource allocation to ensure alignment with actual needs. Address imbalances across different areas. • More involvement and collaboration in decision-making when it comes to necessary resources. • Address imbalances (shortages or excess staff) across different areas.

2EC Report Recommendation	Dialogue Insights and Improvements
<p>“Provide training to the entire organization with practical examples unique for each department on how the new shared understanding of safety and safety culture to the organization will change the way business is done and why it is important to make the change. This training can be incorporated into existing programs.”</p>	<p>Represented employee dialogues provide insight into how SoCalGas can approach training on a new shared understanding of safety. This would include focusing on:</p> <ul style="list-style-type: none"> • Information sharing and partnership to promote a more holistic understanding of safety and address disconnects between the field and office personnel in terms of impact and perception of safety. • Desire for more training opportunities, hands-on training, simulations, job aids, mentors, and refresher courses. • Recognition that safety is complex, and we need to focus more on how we invest in our safety capacity, not metrics as the primary focus. Unrealistic expectations arise due to this focus on metrics.
<p>“Incorporate the broader concept of safety e.g., include examples of public safety, security, into safety items on meeting agendas, in tailgates, in job hazard assessments, newsletters, etc.”</p>	<p>Represented employee dialogues identified a need for more integration, both to reinforce message and direction, and to avoid “safety overload” (too many communications, new training, new practices, etc.), and a need to tailor content to specific groups to make sure it is applicable. This feedback includes:</p> <ul style="list-style-type: none"> • Some employees expressed concerns about transparency in safety communication. They believe that consistent information should be provided by supervisors to all team members. • Communication with the public is also important to promote SoCalGas as a safe company. • Employees recognize SoCalGas’ focus on customer safety, but there’s a desire to enhance employee safety during customer interactions. • Desire from some employees for more focus on ergonomics for those in the field, office security and safety, and technology.
<p>“Conduct dialogue sessions with representatives from field personnel across business units on how to best communicate field-based experiences upward in the organization.”</p>	<p>Dialogues revealed the following ideas for how best to communicate field-based experiences upward in the:</p> <ul style="list-style-type: none"> • More collaboration, consistency/alignment, and information sharing. • More open communication around safety. • Desk and field rides. • Mentorship programs for new employees.

2EC Report Recommendation	Dialogue Insights and Improvements
	<ul style="list-style-type: none"> • Represented employees feel a disconnect between themselves and management employees. They feel that management does not have the field knowledge to make the safety procedure decisions that are made. Represented employees want more visibility and communication when safety decisions are made.
<p>“Develop new guidance through conversations on how to make better decisions when rule-based behavior does not work. Conversations can be centered around different real-life scenarios that involved judgements in the field that were not covered in policies.”</p>	<p>Conversations with our represented employees about the complexity of safety reinforce the importance of dynamic and safety-focused decision-making, not solely rule-based. Initial feedback indicates a need to embrace the complexity of safety and provide guidance on safety goals, strategies, and tools beyond standards and policies. Dialogues indicated:</p> <ul style="list-style-type: none"> • Recognition that safety is complex, and we need to focus more on how we invest in our safety capacity, not a primary focus on metrics. • Desire for knowledge transfer programs to preserve institutional knowledge and ensure a smoother transition for incoming employees • More hands-on training and mentorship programs for new employees. • Represented employees feel a disconnect between themselves and management employees. They feel that management does not have the field knowledge to make the safety procedure decisions that are made. Represented employees want more visibility and communication when safety decisions are made.
<p>“Train managers and personnel to think about potential, unexpected, and unknown conditions, the “what if” this happened situations, to enhance individual accountability and to detect latent safety hazards.”</p>	<p>Conversations with our represented employees about the complexity of safety highlight the importance of a questioning attitude and considering hazards and risks associated with our work. Dialogues indicated:</p> <ul style="list-style-type: none"> • There are mixed perceptions of psychological safety. Some employees feel comfortable sharing thoughts with their team and supervisors, while others fear retaliation when reporting incidents. Negative connotations exist, with some viewing incident sharing as cowardly. • Desire for open communication and emphasis on learning from mistakes rather than blame. Fear of consequences discourages incident reporting.

2EC Report Recommendation	Dialogue Insights and Improvements
	<ul style="list-style-type: none"> • Recognition that safety is complex, and we need to focus more on how we invest in our safety capacity, not manage to a goal of 0 incidents or a focus primarily on metrics. • Employees should have situational awareness.

2.0 APPROACH

2.1 Selection of Facilitators

To facilitate dialogues and encourage conversations around a more comprehensive approach to safety, the Safety Organization engaged the Safety Champions Network to help facilitate dialogues.⁴ Eleven Safety Champions from various departments like Gas Operations, Regional Public Affairs, Customer Service and Construction volunteered to lead discussions about safety. Additionally, 8 employees from the Safety Organization and 1 Safety Initiative Lead supported dialogue facilitation⁶. A total of 20 employees from the Safety Organization and Safety Champion Network supported the facilitation of represented employee dialogues.

All 20 facilitators also supported with facilitating management employee dialogues in 2023. Their prior experience, coupled with ongoing support from internal and external experts such as 2EC and Organizational Effectiveness, contributed to an increased depth in conversations and significantly enhanced the overall quality of the dialogues.

2.2 Facilitation Training

To enhance internal capabilities, dialogue facilitators participated in an 8-hour facilitation training conducted by 2EC in 2023, prior to the management employee dialogues (initiative 1B). This training consisted of a 4-hour virtual component which included training on the basics of facilitation and overview of concepts like effective notetaking, mindful communication, and humble inquiry. The virtual session was followed by a 4-hour in-person learning-by-doing session which included break out groups and practice of key facilitation concepts.

In addition to the initial training, 2EC provided a 2-hour virtual refresher training to all facilitators in 2024 prior to the start of the represented employee dialogue (initiative 1C). This ensured that all facilitators were well-prepared, confident and that the facilitation core concepts were easily recalled, contributing to the overall success of the dialogues.

Full 2EC training agenda is in Appendix A.2, take-aways and recommendations for future trainings are in Section 3.4.

⁴ The Safety Champion Network consists of Safety Champions that serve a vital role in the development, implementation, and enhancement of organizational safety processes. Safety Champions represent various operational and functional departments to lead the adoption of enterprise-wide culture building objectives and key safety strategies.

2.3 Selection of Participants

The following methods were employed to achieve the objective of engaging with 7% of the represented employee population. To generate interest and recruit volunteer participants, various methods were employed, including executive sponsor emails, town halls, and other communication channels. As a result of these efforts, a total of 51 represented employees expressed interest in participating in a dialogue by separately reaching out to the Safety Forward team.

Additionally, Organizational Effectiveness supported the process by providing samples of represented employees for contact. This process began with cleaning up the employee population list to remove management employees, interns, and contractors. The first stratified sample size provided by Organizational Effectiveness included 10% of the represented employee population selected from the list, representing all 18 departments. Participants were then randomly selected within their respective departments. The stratified sampling method ensured proportional representation based on department size, offering equal opportunities for all company departments to be included in the dialogues.

After reviewing the list of employees who accepted invitations to participate from the first sample, a second stratified sample size was chosen. This second sample comprised 2% of the population list, totaling 102 full-time employees from departments not yet represented by the confirmed participants from the first sample. The third and final sample consisted of 21 randomly selected part-time employees from four departments with part-time staff. No employees were contacted more than once. Overall, participants were drawn from volunteers, two stratified samples of full-time employees, and one stratified sample of part-time employees. A total of 379 employees expressed interest in participating in the represented employee dialogues, resulting in an actual sample size of 8%, exceeding the 7% goal.

2.5 Dialogue Planning and Scheduling

Each dialogue session lasted 90 minutes and involved one facilitator and one notetaker. These sessions took place at 23 different company locations, considering factors such as primary work location, shift hours, and hybrid schedules to minimize operational disruptions. Additionally, two virtual sessions were scheduled to accommodate employees who could not attend in person; these virtual sessions also included employees located in various places where finding a suitable central company location for an in-person dialogue was challenging.

Dialogues were scheduled with 6-10 participants per session. Each dialogue session included employees from diverse departments, fostering richer conversations and enhancing participants' understanding of how various teams contribute to safety.

Dialogue duration, participant count per session, facilitator and notetakers roles and expectations, and meeting type (in-person or virtual) were determined based on learnings from 1A leadership dialogues, 1B management dialogues and recommendations from 2EC and National Safety Council (NSC). A total of 47 dialogue sessions were completed between March 2024 and May 2024.

Dialogue schedules are in Appendix B.

2.6 Dialogue Prompts and Structure

For Initiative 1C, dialogues continued and expanded to include union-represented employees. Dialogue prompts, questions, and introductory and closing remarks were developed for a consistent approach for every session. A co-creation session involved all facilitators collaborating, brainstorming, and sharing ideas on prompts and login/logout questions for the dialogues.

The dialogue prompts aim to explore safety culture and employee experiences at SoCalGas. They cover topics such as participants' roles in safety, challenges they face, clarity of policies, communication with supervisors, the organization's emphasis on safety, effective practices, and differences between contractors and employees in safety approaches.

Regular debriefs with facilitators enabled the team to discuss their experiences and gather feedback from peers on completed dialogues. Additionally, 2EC participated as facilitators and notetakers in 15 initial dialogue sessions, offering valuable insights. Based on this feedback, adjustments and modifications were made throughout the process.

The final prompts used during the dialogues are listed below:

1. In your view, what role do you play in safety? Why do you say that?
 - If only one aspect of safety is mentioned ask how other aspects of safety (public, infrastructure, contractor, employee) may be impacted by their tasks/job.
2. What are the biggest challenges to getting your job done?
 - Why do you think they exist?
3. In what type of situations are the policies or guidelines not clear?
 - Why do you think that is? How do you proceed?
 - *If applicable - how do wish it would be?
4. How would you describe your communication with your supervisor/management?
 - What can you talk about?
 - *If needed - what can't you talk about? Why?
5. What does SoCalGas' emphasis on safety look like to you?
 - Why do you think that?
6. What things work really well at SoCalGas?
 - How do they/this relate to safety? Why do you think so?
7. How would you describe the differences between SoCalGas contractors and employees with respect to their approaches to safety?
 - Why are there differences (if any)?
 - *If needed - can you please provide an example what it can look like?

Facilitators were encouraged to allow the conversation to flow naturally, enabling employees to share and convey what is most critical to them and their teams. Not all questions were asked during every

dialogue session, allowing employees sufficient time to delve deeper and explore certain topics and questions in more detail. Facilitators would redirect and intervene if discussions veered off-topic.

Feedback and recommendations for future dialogues are in Section 3. Complete structure, flow of dialogues and prompts are in Appendix C.

2.7 Qualitative Analysis of Dialogue Notes

Analysis of the qualitative dialogue comments was conducted once the dialogue sessions were completed. First, all notes from all dialogue sessions were organized into one document so data could be viewed all at once. Dialogue session notes initially came from different notetakers, so notes were re-organized, re-formatted and consolidated into one Excel document. Notes were compiled and split by question. In this Excel document, the descriptive and normative notes, the participant number (as indicated by the notetaker), and session information (i.e., date, location, facilitator name, notetaker name) were indicated on the sheet so original notes could be referenced if necessary.

Once the data was organized, the descriptive notes were read and coded. Descriptive notes are paraphrased or verbatim notes of what was said during a dialogue session. Normative notes, on the other hand, are notes of additional context and the interpretations from the notetaker. Normative notes were used to help understand the descriptive notes, but were not coded, as they are subjective interpretations from the notetaker. Each of the 3 notes were read and the main idea(s) was(were) identified. Some comments had one main idea while others had multiple main ideas. This was because of the different note formats from different notetakers.

A theme represents a pattern or relationship across a data set. Themes in the dialogue data comments were developed when there was a pattern in the main themes of the descriptive comments. Themes were named for the repeated idea. Definitions of each theme came together as more comments were coded into the theme. Each definition specifies the most prominent and common threads within the theme. Phrasing of the definition of each theme utilized the terminology used by participants. A total of 27 themes were found in the data.

Once all of the comments were themed, the themes were then connected under umbrella concepts. An umbrella concept is used to describe a broader category of concepts compared to a single theme. While the themes represent one idea, the umbrella concept represent a broader connection between multiple themes. The 27 themes fit into 6 umbrella concepts with some themes fitting under multiple umbrella concepts.

To analyze the data for any department-specific patterns, the department of each participant was identified by utilizing the notes from notetakers. Once this process was completed, departments with more than 5 participants were analyzed for department-level themes patterns.

Qualitative data analysis of the dialogue session notes did not include observations of tone, intent, or emotion of response by question as initially planned due to inconsistent dialogue session notes. Although tone, intent and emotion are not considered when identifying themes due to the subjectivity of perception, they can provide some general insight into certain issues that participants may feel strongly or particularly enthusiastic about. Future dialogues will consider how facilitators can capture these emotions through modifications and improvements in the notetaking process.

3.0 KEY ACTIVITIES AND LEARNINGS

3.1 Participation in Dialogues

The goal for the dialogues were to engage with 7% of the represented employee population, which totaled 325 employees. A total of 568 employees were randomly selected, using a stratified random sampling method, and invited to participate in a dialogue session. The goal was to engage with 7% of the represented employee population or 325 employees.

Out of the 568 randomly selected employees, 328 or 58% of them, expressed interest in participating. Furthermore, an additional 51 employees, who became aware of the dialogues through enterprise communications and word of mouth from their peers and supervisors, also expressed their interest in participating.

At the start of the dialogue sessions, the total initial sample size was 379 employees, which was 8% of the total represented employee population. All 379 employees were scheduled for a dialogue session.

	Goal Sample Size	Initial Sample Size	Actual Participants
Percentage	7%	8%	7.31%
Count of EE	325	379	339

As dialogues continued, participation decreased due to various factors like vacations, sick days, trainings, changes in shifts, and conflicting priorities. The final count of employees that participated was 339 employees or 7% of the represented employee population. Despite the drop in participation, the goal of engaging with 7% of the employees was successfully met. Additionally, all 18 departments were represented in the dialogue sessions.

3.2 Dialogue Session Themes and Insights

The comments from 47 dialogue session notes were analyzed for their main ideas and topics. Repeated main ideas and topics were categorized and bucketed to form 27 different themes. The 27 themes were then reviewed to find 6 overall umbrella concepts.

SoCalGas' Organizational Effectiveness team statistically analyzed the saturation of the themes. Saturation is reached in qualitative research when no new themes, ideas or opinions are identified even as more participants are engaging in dialogues. The goal of the conservative method of this saturation analysis is to reach a 0% saturation ratio by comparing a base number of themes (from the first 4 sessions) to the number of new themes identified in a group of 3 sessions at a time. It was found that when using the most conservative saturation analysis, a 0% saturation ratio was reached by session 16.

The table below shows all 27 identified themes from the management employee dialogues and their definitions. Themes are listed from most to least frequent across the dialogues.

Theme	Definition/Notes
1. Supervision	<p>Perceptions of supervision depends on the supervisor and their level of knowledge and experience. On one hand, some participants have good communication with and feel supported by their supervisor. This line of thinking generally occurred when participants expressed that their supervisor was experienced and knowledgeable. Positively perceived supervisors were said to have open communication and regularly hold team safety meetings. On the other hand, some employees felt communication was lacking or they did not feel supported by their supervisor. This is oftentimes because employees felt their supervisor was not as experienced as a supervisor should be. Many were told to just refer to the procedure when they asked a question. Some felt their supervisors micromanaged the work they did and were too focused on metrics. However, regardless of perceptions of supervision, many participants felt their supervisor had limited scope. The concerns they share with their supervisor only go so far and were not always able to reach the right people.</p> <p>“I think communication with local management is fine but as a concern or a need gets sent up the ladder it’s almost like there is no empathy or willingness to help after it passes the local management stage.”</p> <p>In response to questions around: supervisor communication</p>
2. Procedure	<p>Procedures were mentioned in response to all of the dialogue questions with mixed opinions. Some felt that procedures at SoCalGas were good and helped the company stay focused on safety. Other participants felt that SoCalGas' safety emphasis was on procedure compliance. Many felt that procedures were excessive and restrictive, sometimes unclear, and sometimes not in alignment with each other. These excessive procedures add extra pressure and sometimes make being safe more difficult. The application and use of procedure and policy is inconsistent and prone to regional differences. Some supervisors or regions come up with their own unofficial procedures. The procedures themselves are sometimes difficult to access on the field since they are only available electronically (and employees only have cellphones in the field) and they are prone to language translation issues.</p> <p>“It feels like there have been a lot of changes recently. People keep coming up with new rules for the next day and make sure everyone follows them. It feels like they're talking to us as if we're children... People are saying it's for safety, but it's more about control. We need to exercise more common sense instead of constantly adding to the rules.”</p> <p>In response to questions around: SoCalGas’ safety emphasis, supervisor communication, biggest challenge to completing work, works well at SoCalGas, unclear guidelines</p>
3. Resources	<p>Some felt they have adequate access to resources while others feel they do not. There is a gap in the resources used in different regions and it often times takes weeks or months to get parts needed for a job due to problems with vendors or supervisor/management approval. Many of the tools currently in use are old and out of date. When there are changes to tools, they are high tech, but some</p>

Theme	Definition/Notes
	<p>participants feel that the new, high-tech version is not necessary and can be distracting rather than helpful. Some participants feel that those in charge of choosing and approving of the tools and resources used are not knowledgeable or experienced in work in the field.</p> <p>“Lack of tools at times can be challenging. Having commonly used materials being short on stock is at times challenging.”</p> <p>In response to questions around: biggest challenge to completing work, works well at SoCalGas</p>
4. Crucial Role	<p>Most participants felt they played a crucial role in safety at SoCalGas. This is because they play a part in employee, customer, public, and infrastructure safety. Some also play a part in customer awareness and knowledge and emergency response.</p> <p>“When I wake up, safety is my responsibility. Safety is not just about coworkers, it’s about people around me and the customers.”</p> <p>In response to questions around: role in safety</p>
5. Workload	<p>Many participants mentioned their workload has increased recently which adds extra time pressure, unrealistic expectations, and is contributing to burnout and turnover. They said they do not have the manpower or the time to complete all orders during a shift, which negatively impacts their metrics, which can contribute to them being blamed for not completing work. Some mentioned they asked for accommodations or changes to their shift schedule to better suit their lifestyle and safety, but they were denied.</p> <p>“We don't have enough man power to get through everything.”</p> <p>In response to questions around: biggest challenge to completing work</p>
6. Communication	<p>Communication was found to be important to represented employees. They feel it is important for SoCalGas to improve information sharing, transparency, and timeliness when speaking about safety and different company initiatives. Even though many mentioned having collaboration opportunities, frequent safety meetings, and time to review communications as a team, some mentioned that the information they receive is inconsistent or limited in scope. Many did mention they appreciated the opportunity to participate in the employee dialogues because they want their voice and opinions to be heard and considered in decision making.</p> <p>“That's where I've said before there's no transparency. I know there are legal issues but there are incidents that we don't hear about until a year later. It's important to know these incidents so we can share and be reminded that we work with a volatile substance.”</p> <p>In response to questions around: supervisor communication, biggest challenge to completing work, works well at SoCalGas</p>

Theme	Definition/Notes
7. Culture Change	<p>In recent years, the safety culture at SoCalGas has changed. There are generational differences in safety and there has been a change in “old-school thinking.” There is more of a focus on safety, communication, psychological safety, and innovation. Many expressed appreciation for the employee dialogues. However, the culture change is still a work in progress. There is still a disconnect between professional and represented employees as well as regional and departmental differences in the way things are done. Safety culture is inconsistent and there is no office focus. Several participants felt that safety culture is excessive. Some feel that the safety culture is "all talk" for media presentation and that SoCalGas does not actually care about safety.</p> <p>“Safety culture as an idea is phenomenal. SoCalGas promotes safety well, but implementation is not good. It’s on the people to be safe, but then we need help.”</p> <p>In response to questions around: SoCalGas’ safety emphasis, works well at SoCalGas</p>
8. Work Environment	<p>Many employees discussed how different things in their work environment impact their safety. Employees must have situational awareness of their environment because things like the dark, the weather, and dogs can impact their safety. Many say they take extra care with driving and parking to ensure they are safe out in the field. However, many complained that the new sensors in company cars are distracting and cannot be turned down or off. Another impact to their safety in the field is interruptions from customers. Multiple employees mentioned they have had unaware customers point guns at them. There are also concerns with office safety and security.</p> <p>“Working in the rain is so dangerous.”</p> <p>In response to questions around: biggest challenge to completing work</p>
9. Training	<p>A lot of participants mentioned they really enjoy the SMITH driving technique and even use it outside of work. Otherwise, there is an interest in more training in the form of hands-on training, simulations, job aids, mentors, and refresher courses. There were specific requests for trainings on current procedures, handling customers, using new technology, ergonomics, and emergency response. Many participants feel there is currently a lack of training opportunities and instead learn on the job from experienced employees.</p> <p>“The importance on how you are training and how training is set up. That the company lacks in actual field training our employees. Classroom training is not really getting you trained for the real work you are performing.”</p> <p>In response to questions around: biggest challenge to completing work, works well at SoCalGas, contractors</p>
10. Customer Awareness and Safety	<p>Customer awareness plays a huge role in the safety of employees and many participants feel that customers need to be better educated on their work to improve safety. Additionally, many employees have dealt with poor customer interactions because of a poor customer notification system; most customers</p>

Theme	Definition/Notes
	<p>do not see the notification that a SoCalGas employee is coming to their house. Participants want a better notification system and uniforms that better identify them as SoCalGas employees. Additionally, employees feel that SoCalGas' safety emphasis is focused on customer safety.</p> <p>“Biggest problem we have, MSAI we are not invited to customers’ homes we are showing up unannounced. They don't believe we work for the company; they don't believe the badge, uniform, or truck. MSAI work does not give customers prior notice of our arrival or work. I have had guns pulled on me on MULTIPLE occasions. It is not safe for me to do my work. It would be nice to get some continuity for customer notification of all SCG work. This is an issue for customer communication.”</p> <p>In response to questions around: role in safety, SoCalGas’ safety emphasis, biggest challenge to completing work, works well at SoCalGas</p>
11. Contractors	<p>Opinions on contractors depended on the contractors themselves. Some participants believed that contractors have similar values as SoCalGas employees, have high work quality, and an understanding of SoCalGas procedures. Other participants felt there were different expectations for contractors and they did not care about safety. Some participants resented contractors and believed all work should be done by full-time employees. Many employees believe that contractors need better uniforms and training for them to better work with customers and follow procedures.</p> <p>“I hear [contractors] don't work safe like we do and it seems like their bosses don't feel the same about safety as we are.”</p> <p>In response to questions around: contractors</p>
12. Metrics	<p>Participants feel that metrics is the main focus of safety at SoCalGas. There is the perception that meeting metrics goals are more important than actual safety to some supervisors and management. Many feel that metrics add extra pressure, time restraints, and unrealistic expectations to their work. Because of metrics, they feel micromanaged and pressure to get work done quickly rather than safely. This focus on getting work done quickly is negatively impacting customer service and satisfaction with customers.</p> <p>“We're told to make times, but it doesn't always work like that and it can create stress. I'll do what I can to speed up a job, but there has to be safety.”</p> <p>In response to questions around: SoCalGas’ safety emphasis, supervisor communication, biggest challenge to completing work</p>
13. Employee Experience	<p>Some participants mentioned that employee experience is declining as older, more experienced employees retire and new hires enter the company. There should be more knowledge transfer so there are no knowledge gaps when employees leave. New employees need more training, hands on experience, and a mentor program.</p>

Theme	Definition/Notes
	<p>“We hire people with degrees and put them into roles but they don’t have the experience to do well.”</p> <p>In response to questions around: supervisor communication, biggest challenge to completing work</p>
14. Management	<p>Represented employees feel a disconnect between themselves and management employees. They feel that management does not have the field knowledge to make the safety procedure decisions that are made. Represented employees want more visibility and communication when safety decisions are made.</p> <p>“Management doesn’t include field in decision making.”</p> <p>In response to questions around: supervisor communication, biggest challenge to completing work, unclear guidelines</p>
15. Psychological Safety	<p>Perceptions of psychological safety were mixed. Some felt that were able to share their thoughts with their team and supervisors while others feared that reporting incidents would result in retaliation. The term psychological safety also had some negative connotations with some employees believing that sharing about incidents is cowardly.</p> <p>“It’s the culture. People aren’t reporting stuff because they’re afraid to get in trouble.”</p> <p>In response to questions around: SoCalGas’ safety emphasis, biggest challenge to completing work, works well at SoCalGas</p>
16. Morale	<p>Many participants felt that morale within teams is good and influenced by their supervisor. However, there is a general desire for more recognition from their supervisors and the company. There were multiple positive comments regarding this year’s company event.</p> <p>“I was happy to be with Gas Company then it slowly diminished. In the end you have situations where you work hard and you get nothing then you work less and that’s not how you want to be.”</p> <p>In response to questions around: supervisor communication, works well at SoCalGas</p>
17. Budget	<p>Participants feel that SoCalGas has a heavy focus on budget, especially now because of the GRC. This focus on budget makes employees feel that SoCalGas does not actually care about safety, as sticking to a budget takes higher priority than getting necessary resources and completing orders safely.</p> <p>“I have brought this up regularly but I was told no budget or time.”</p> <p>In response to questions around: SoCalGas’ safety emphasis, biggest challenge to completing work</p>

Theme	Definition/Notes
18. Employee Safety	<p>A handful of employees feel that SoCalGas' safety emphasis is on employee safety. However, some employees feel there can be better focus on ergonomics for those in the field, office security and safety, and technology. Multiple people mentioned the Anaheim incident.</p> <p>“After that incident (the Anaheim incident) I feel nervous when I am in the building - there is no place to hide.”</p> <p>In response to questions around: role in safety, SoCalGas’ safety emphasis</p>
19. Documentation	<p>Many participants felt that documentation is inconsistent and excessive. The information in documents is often incomplete or lacking, which leads to gaps in knowledge. The transition into technology-based documentation has made it difficult to check procedures and submit documents from the field, where many employees only have a phone.</p> <p>“For the company, we may all do similar jobs around the field, but when it comes to filling out paperwork, it's all different. But it shouldn't be different; this needs to be incorporated into training.</p> <p>In response to questions around: biggest challenge to completing work, unclear guidelines</p>
20. Configuration Management	<p>Participants felt that there are issues with configuration management in their work. There are issues with gaps in information, access to meters and procedures, and timeliness in information reception.</p> <p>“GIS has two view forms. seems like 1 form is updated on a constant and 1 is not. Two different sides of information and not everyone has access to both forms. this is an issue.”</p> <p>In response to questions around: biggest challenge to completing work</p>
21. Teams	<p>Many participants had positive things to say about their team. They feel they can rely on those in their team for their knowledge and collaboration opportunities.</p> <p>“Here, we have a very good crew where we help each other in all aspects.”</p> <p>In response to questions around: supervisor communication, works well at SoCalGas</p>
22. Incident Investigation	<p>Participants feel that incident investigation is inconsistent and prone to blame culture. Some participants feel there is nothing to stop “repeat offenders” from continuing to be unsafe.</p> <p>“The investigation includes - asking questions about ‘what were you doing’ - trying to figure out how we can avoid it. Almost like pressuring into confessing ‘what could you have done to avoid the situation?’”</p>

Theme	Definition/Notes
23. Non-Crucial Role	<p>In response to questions around: SoCalGas' safety emphasis</p> <p>The handful of employees that felt they did not play a crucial role in safety at SoCalGas said most of their day is spent sitting. Their main safety focus is around ergonomics. These comments came from employees in the accounting, customer service, and customer contact departments.</p> <p>"I work from home, so my safety is different from the field, I don't know exactly how my safety falls into place."</p> <p>In response to questions around: role in safety</p>
24. Reactive	<p>Some participants feel that SoCalGas is reactive in response to incidents rather than proactive to avoid incidents. Many procedures are written in response to an incident.</p> <p>"They may see an issue, but they don't do anything until it's there."</p> <p>In response to questions around: SoCalGas' safety emphasis</p>
25. Regional Differences	<p>There are regional and departmental differences in the way procedures are communicated and enforced by supervision. This leads to a disconnect and inconsistencies in how procedures are supposed to be used.</p> <p>"I feel like there is no consistency. Regions are being controlled by different leads and managers at every base. Everyone leads differently."</p> <p>In response to questions around: supervisor communication, unclear guidelines</p>
26. Compensation	<p>There are mixed opinions regarding compensation. Some felt that their pay and benefits were good while others felt it was lower compared to other organizations. There is positive reception of the education assistance benefit.</p> <p>"We are compensated good for our jobs, but not compared with other utilities."</p> <p>In response to questions around: biggest challenge to completing work, works well at SoCalGas</p>
27. Company Culture	<p>Some employees felt that the company culture (beyond safety) is a positive. SoCalGas is supportive of time off requests and career development.</p> <p>"I have had many jobs and none has treated me as well as SoCalGas."</p> <p>In response to questions around: works well at SoCalGas</p>

3.3 Process and Outcome Measures: Survey Results

Post-dialogue surveys were conducted to assess dialogue quality and participants' understanding of comprehensive safety. A total of 154 participants responded to the survey. While 6 out of 18

departments were not represented in the survey results, the following departments participated: Aboveground Storage, Distribution Planning & Project Management, Gas Operations, Support Services, Customer Contract Centers, Gas Transmission Operations, Remittance Processing, Customer Operations, Customer Service, and Supply Chain Management.

Regarding participants' roles in safety, most felt their roles were either somewhat clear (26%) or extremely clear (73%), with only 1% indicating a lack of clarity. When asked about comprehensive safety, 72% of participants acknowledged their impact on employee safety, contractor safety, public safety, and infrastructure safety. Understanding of the concept varied: 38% felt they understood it somewhat well, 56% extremely well, 5% not very well, and 1% not at all well.

Survey results indicated that dialogue sessions provided a psychologically safe space for participants to share opinions and thoughts. Satisfaction levels were high, with 77% extremely satisfied, 19% somewhat satisfied, and minimal dissatisfaction. An overwhelming 99% would recommend participation to peers, and 96% expressed interest in future Safety Forward dialogues.

Respondents also provided feedback on improving future dialogues and promoting a comprehensive safety approach. While most feedback was positive, a few participants mentioned feeling that their sessions turned into complaint sessions.

Respondents feedback on conducted dialogues was as follows:

- 1. Dialogue Outcomes:** Participants are interested in hearing the results of the dialogue sessions and any change that will occur as a result
- 2. Psychological Safety:** Participants felt heard during the dialogue sessions and were glad there were opportunities for field employees to participate. Overall, participants were comfortable with the dialogues and were glad there were confidential spaces for them to be truthful
- 3. Shared Space:** Participants were glad to hear feedback from other employees, especially those in different departments to hear other perspectives
- 4. Structure:** Some employees wished there was more time for the dialogue. Multiple participants wanted more structure around the dialogues as they often strayed off topic. Additionally, there was an interest in sticking to a few key topics and digging deeper.

Complete pre-dialogue and post-dialogue survey results are included in Appendix D.

3.4 Recommendations and Take Aways

3.4.1 Recommendations for Future Dialogues

Based on feedback from post-dialogue surveys, feedback from facilitators, and observations of 15 dialogues that 2EC supported, many facilitators were able to create a good, shared space where participants felt psychologically safe to share their opinions and beliefs. It was observed and mentioned that facilitators showed that they were genuinely interested in what participants had to share. 2EC noted indicators of shared space being demonstrated by facilitator and participant body language, the use of follow-up questions, careful listening, and respect. Facilitators effectively used tools taught during

the training like ice breaker/log-in questions and I DO ART⁵, and an appropriate amount of time was allotted for introductions to get participants engaged before proceeding with the prompts.

2EC also provided additional feedback on areas of improvement for facilitators. Facilitators were advised to be more mindful of what they already know, ensuring that they stay neutral, set aside any assumptions, and approach each dialogue with curiosity. To enhance the natural flow of the session, it was recommended that facilitators become more familiar with the introduction and avoid reading it word-for-word, as this would help them engage participants in a more organic and conversational manner. Continuous note-taking was emphasized as crucial, with the note-taker playing an essential role in capturing key points and insights throughout the session. Facilitators were also reminded to use body language to create a welcoming atmosphere, allowing participants to feel more at ease. It was further suggested that facilitators encourage participants to elaborate on their thoughts rather than rushing through a structured set of questions. The focus should not be on getting through every prompt, as this is not a focus group, but rather on allowing for deeper exploration of ideas and experiences.

Based on post-dialogue survey results, facilitators will be encouraged to ask more exploratory questions, particularly focusing on the ‘why’ behind cultural values, beliefs, and assumptions. While dialogues should identify visible manifestations of the culture, they should also delve into the underlying drivers of the current safety culture at SoCalGas. It’s important to note that dialogues are not intended for solving issues raised during conversation; instead, they serve as an opportunity to ask follow-up questions about the drivers behind those issues. Facilitators will continue to actively engage all participants by directing questions to those who haven’t shared as much and seeking their views on other participants’ comments.

In response to operational constraints and the geographical distribution of employees, two virtual dialogue sessions were introduced. These sessions served a dual purpose: as a pilot to assess the efficacy of virtual dialogues and as a practical solution for including participants who were too far apart logistically for in-person sessions. Facilitators’ observations highlighted key points regarding virtual sessions: they were found to be less effective than in-person sessions due to the lack of physical presence and face-to-face interaction, which posed challenges in creating a psychologically safe space for open dialogue. Additionally, overall engagement and participation from attendees were lower in virtual sessions, influenced by factors such as distractions, technical issues, and reduced interpersonal connection.

While the virtual sessions provided valuable insights, the preference remains for in-person dialogues due to their greater effectiveness in fostering meaningful conversations and promoting active engagement.

3.4.2 Recommendations for Dialogue Notetaking

The Organizational Effectiveness team provided several observations and best practices aimed at improving the facilitation and documentation of the represented employee dialogues. One key

⁵ As part of our dialogue sessions, we utilized the IDOART tool to ensure effective facilitation. This tool helps lead meetings or group processes by establishing a clear purpose, structure, and goals right from the start. It enables all participants to grasp every aspect of the session, fostering a secure common ground. IDOART stands for Intention, Desired Outcome, Agenda, Roles/Rules and Time.

recommendation focused on note-taking, emphasizing the importance of writing notes in a way that an outsider could easily understand the context of the conversation without having been present. Notes should be formatted in a conversational style, with each thought presented on a separate line to create a natural flow. Additionally, many notes were found to contain incomplete sentences. It was suggested that after each session, notetakers should revisit their notes to fill in missing information, ensuring the notes remain clear and cohesive without inserting personal opinions or interpretations. Paraphrasing or adding context to incomplete notes was also recommended to enhance clarity.

The dialogue questions used in the sessions were another area of focus. Not all questions were asked during every session, which likely indicated that there were too many questions for the allotted time. To foster deeper, more meaningful conversations, it was recommended that fewer, more focused questions be asked during future sessions. Additionally, some of the questions in the notes were phrased differently than the standardized versions. It is crucial that all dialogue questions be asked exactly as written to ensure that participant responses are consistent and reflective of the same prompts across sessions.

Follow-up or probing questions also received attention in the feedback. It was noted that many follow-up questions were off-topic or unrelated to the original questions, which in some cases diverted the conversation away from safety issues. Facilitators were encouraged to ensure that follow-up questions remain relevant to the original inquiry and that notes clearly indicate which follow-up questions are tied to which primary questions.

Finally, the Organizational Effectiveness team highlighted the results of the saturation analysis, which suggested that conducting fewer dialogue sessions could yield the same results. This would allow for a more efficient use of time and resources while still achieving the desired outcomes.

3.5 Sustainment Plan

3.5.1 Communications

In Q3 2024, themes from the represented employee dialogues will be communicated to all SoCalGas employees. This three-stage process involves an in-depth review of the six umbrella concepts and 28 themes with facilitators. The findings will then be shared with all participants who took part in the dialogues. Finally, a high-level overview of the themes and concepts will be disseminated through an enterprise communications bulletin to engage employees, seek feedback, and encourage support for future activities.

3.5.2 Develop Emergent Capabilities

To enhance and evolve future employee dialogues, the recommendations highlighted in section 3.4 will be taken into account. Additionally, it's recommended that the Safety Organization and Organizational Effectiveness collaborate with other key departments to develop an internal training course for new facilitators and refresher trainings based on concepts taught during the 2EC training. This internal training initiative will further enhance SoCalGas' capabilities to support ongoing culture-based dialogues, focus groups, and engagement efforts. Relatedly, it's recommended that SoCalGas determine which department or departments will be responsible for developing, maintaining, and deploying future dialogue activities.

3.5.3 Revised Safety Culture Improvement Plan

The themes and concepts emerging from the represented-employee dialogues, as well as those anticipated in future dialogues, will shape the revised safety culture improvement plan, and guide ongoing safety activities. As noted in Section 3.5.1, the dialogue analysis will be communicated broadly across the organization, and Safety leaders and business owners will review and collaborate to establish a shared understanding of the insights gained from the management employee dialogues and future dialogues. These insights will play a crucial role in informing future strategic planning, acting as the primary reference document for defining initiative-level scopes and facilitating the execution of forthcoming safety efforts.

As detailed in the analysis of our goal to “gather insights and brainstorm on improvement opportunities”, initial analysis has been done to better understand how the management employee dialogues can shape and inform how to act upon the recommendations contained in the 2EC Report. The 2EC Report recommendations will continue to be analyzed to enhance impact based on these and future dialogues.

APPENDIX A

A. 1 Additional Analysis

Similarities & Differences Across Dialogue Groups

Throughout the dialogues, management, represented employees, and leadership all emphasized the importance of safety culture at SoCalGas, though their perspectives varied based on their roles. There was a shared commitment to continuous improvement and long-term thinking, with all groups advocating for a proactive, innovative learning culture. However, management and represented employees frequently expressed frustration over a perceived disconnect between themselves and leadership, a sentiment not mirrored in leadership discussions.

Communication and information sharing were identified as critical areas for improvement, with all groups agreeing that siloed departments limit collaboration and transparency. Management employees, in particular, felt that most safety communications focused on field safety and were not always relevant to their office environments, highlighting a need for more tailored messaging.

Safety concerns were prevalent across all dialogue groups, with issues ranging from the inherent dangers of working with natural gas to concerns about office security and workload. Both management and represented employees raised frustrations about the complexity of safety processes, policy inconsistencies, and the constantly changing procedures. Leadership shared similar concerns but focused on the need for clearer processes with fewer approval layers.

Another key theme was the desire for more recognition and support for safety efforts. Management and represented employees called for increased acknowledgment of their commitment to safety, which they believe would boost morale. Leadership echoed this by expressing an interest in enhancing employee engagement through support and recognition initiatives.

All groups agreed that SoCalGas tends to operate reactively, with a strong focus on metrics and budgets, often at the expense of proactive safety measures. While leadership recognized this challenge, they grappled with how to shift from a culture of compliance and blame to one that prioritizes safety in a heavily regulated environment.

Lastly, all groups recognized the importance of having adequate resources to maintain a safe working environment. While recent budget constraints have posed challenges, there was a shared understanding that enhancing the availability of tools, time, and personnel would further support SoCalGas' commitment to safety and help ensure that employees can continue to perform their duties safely and effectively.

Department Level Themes

During the represented employee dialogues, several key department-specific trends emerged regarding safety perceptions at SoCalGas. A recurring sentiment from employees in Gas Distribution and Gas Transmission & Storage was that the company does not genuinely prioritize safety, with many referencing tight budgets with Gas Distribution and Customer Service Field & Solutions sharing the view of reliance on contracted employees as contributing factors. In Customer Service and Gas Distribution, there was also a strong emphasis on the importance of customer awareness, particularly in ensuring proper notification and communication to maintain safety. In contrast, employees from Accounting and

Customer Service expressed feelings of playing a non-crucial role in safety, while others in Customer Service Field & Solutions and Gas Distribution felt their daily tasks and involvement in customer awareness were integral to maintaining safety. Additionally, concerns about the work environment were noted, with employees in Gas Transmission & Storage and Gas Distribution highlighting office security, and those in Customer Service Field & Solutions raising concerns about the impact of weather conditions on their safety.

A.2 2EC Facilitator Training Agenda

Facilitation refresher training was conducted on March 12, 2024.



Dialogue Facilitator Refresher Training March 12, 2024



Time	Activity	Description
09.00	Welcome	Opening remarks, introductions
09.05	I DO ART	Plan for the session
09.10	Log-in	Presencing and engaging all participants
09.15	Presentation	Skills for the Facilitator – Dos and Don'ts
09.30	Learning by Doing – Round 1	Participants Co-Facilitating with 2EC 2 groups concurrently
10.00	Feedback – Round 1	Dialogue to enhance the learning including questions and answers
10.15	Learning by Doing – Round 2	Participants Co-Facilitating with 2EC 2 groups concurrently
10.45	Feedback – Round 2	Dialogue to enhance the learning including questions and answers
10.55	Log-out	Engaging all Participants
1100	End of session	

APPENDIX B

B.1 Dialogue Schedule

Date	Time	Location	Conf Rm (Bldg #, etc)
Wed, Mar 27, 2024	9:00 AM	Redlands	Conf Rm - Redlands 01-0015C
Wed, Mar 27, 2024	1:00 PM	Redlands	Conf Rm - Redlands 01-0015C
Thu, Mar 28, 2024	8:30 AM	Downey Base	01-205
Mon, Apr 1, 2024	9:00 AM - 10:30 AM	Monterey Park	A 02-600
Mon, Apr 1, 2024	1:00 PM - 2:30 PM	Monterey Park	A 02-600
Tue, Apr 2, 2024	8:00 AM - 9:30 AM	Anaheim Base	Anaheim - conference room 01-370
Tue, Apr 2, 2024	8:30 AM - 10:00 AM	Belvedere Base	Belvedere - small conference room
Wed, Apr 3, 2024	8:30 AM - 10:00 AM	Downey Base	01-205
Wed, Apr 3, 2024	8:30 AM - 10:00 AM	Belvedere Base	Belvedere - small conference room
Fri, Apr 5, 2024	8:00 AM - 9:30 AM	Chatsworth	large Conf. Rm for 30 people (6am-1pm)
Fri, Apr 5, 2024	10:00 AM - 11:30 AM	Chatsworth	large Conf. Rm for 30 people (6am-1pm)
Mon, Apr 8, 2024	8:30 AM - 10:00 AM	Palm Desert	Palm Desert Bldg A 01-260
Mon, Apr 8, 2024	9:00 AM - 10:30 AM	Azusa Base	Azusa ASMBLY01
Tue, Apr 9, 2024	9:00 AM - 10:30 AM	Ramona Base	Romoland 01 049 Conf Rm
Wed, Apr 10, 2024	8:00 AM - 9:30 AM	Anaheim Base	Anaheim - conference room 01-340
Wed, Apr 10, 2024	9:00 AM - 10:30 AM	Azusa Base	Conference Room - Azusa 01-001
Thu, Apr 11, 2024	9:00 AM - 10:30 AM	Azusa Base	Conf Rm - Azusa ASMBLY01
Fri, Apr 12, 2024	9:00 AM - 10:30 AM	Monterey Park	Conf Rm - MPK A 02-600
Tue, Apr 16, 2024	9:00 AM - 10:30 AM	Compton Base	Conf Rm - Compton Bldg A 01-835
Tue, Apr 16, 2024	9:00 AM - 10:30 AM	Visalia Base	Visalia Base - Conf. Rm - 01-215
Wed, Apr 17, 2024	9:00 AM - 10:30 AM	Compton Base	Conf Rm - Compton Bldg A 01-835
Wed, Apr 17, 2024	9:00 AM - 10:30 AM	Chino Base	Conf Rm 01-001
Thu, Apr 18, 2024	9:00 AM - 10:30 AM	San Pedro Base	San Pedro Conf Room
Thu, Apr 18, 2024	9:00 AM - 10:30 AM	Compton Base	Conf Rm - Compton Bldg A 01-835
Tue, Apr 23, 2024	9:00 AM - 10:30 AM	Yukon Base	Conf. Rm 01-100
Tue, Apr 23, 2024	8:30 AM - 10:00 AM	Downey Base	Conf Rm - Downey 01-205
Wed, Apr 24, 2024	8:30 AM - 10:00 AM	Glendale Base	Conf Rm - Glendale 01-150
Thu, Apr 25, 2024	9:00 AM - 10:30 AM	Anaheim Base	Conf Rm - Anaheim BLDG A 01-010
Tue, Apr 30, 2024	8:30 AM - 10:00 AM	Saticoy Base	Conf Rm - Saticoy 01-125
Wed, May 1, 2024	8:30 AM - 10:00 AM	Anaheim Base	Conf Rm - Anaheim BLDG A 01-370
Wed, May 1, 2024	8:30 AM - 10:00 AM	Redlands	Conf Rm - Redlands 01-1005
Thu, May 2, 2024	9:00 AM - 10:30 AM	Redlands	Conf Rm - Redlands 01-0015C
Tue, May 7, 2024	9:00 AM - 10:30 AM	Blythe	Blythe - Trailer Conf Room
Tue, May 7, 2024	9:00 AM - 10:30 AM	Valencia Base	Conf. Rm 01-0080
Tue, May 7, 2024	1:00 PM - 2:30 PM	Belvedere Base	Belvedere - small conference room
Wed, May 8, 2024	8:30 AM - 10:00 AM	Anaheim Base	Conf Rm - Anaheim BLDG A 01-340
Wed, May 8, 2024	8:30 AM - 10:00 AM	Chino Base	Conf Rm 01-001
Wed, May 8, 2024	8:30 AM - 10:00 AM	Bakersfield Base	Conf Rm - Bakersfield 01-123
Thu, May 9, 2024	9:00 AM - 10:30 AM	Oxnard Base	Conf. Rm 01-305
Tue, May 14, 2024	9:00 AM - 10:30 AM	San Luis Obispo Bas	Conf Rm - San Luis Obispo 01-0125
Wed, May 15, 2024	9:00 AM - 10:30 AM	Monterey Park	MPK A 02-658 CONF RM
Wed, May 15, 2024	9:00 AM - 10:30 AM	Riverside Base	Riverside Base - Conf. Rm 01-0245
Tue, May 21, 2024	9:00 AM - 10:30 AM	Azusa Base	Conf Rm - Azusa ASMBLY02
Wed, May 22, 2024	8:30 AM - 10:00 AM	VIRTUAL	VIRTUAL
Wed, May 22, 2024	8:30 AM - 10:00 AM	VIRTUAL	VIRTUAL
Thu, May 23, 2024	9:00 AM - 10:30 AM	Santa Monica Base	Santa Monica Conf Rm 01-600
Thu, May 23, 2024	9:00 AM - 10:30 AM	Downey Base	Conf Rm Downey Base - 01-205

APPENDIX C

C.1 Dialogue Structure and Prompts

Log-in/Introduction: participants were asked to introduce themselves and were asked to answer a log-in question. When doing introductions facilitators will capture participant department (e.g., Participant 1 - CS, Participant 2 - Accounting, Participant 3 - Distribution). This enables insights and themes to be captured by department if applicable.

- Name, department & 1 Log -in question (facilitator choice)

Example Log-in Questions:

- What motivates you to come to work?
- What is something you are looking forward to in the next 12 months?
- Which professional or personal skill are you currently working on?
- What the 1st job you ever had? What the best and worst thing about it?

I DO ART: facilitators covered the intention, desired outcome, agenda, roles/rules, and time (duration) during every dialogue. The document below was provided to facilitators to discuss, project-on screen or share via printed copies.

Represented Employee Dialogues

<p>INTENTION</p> <ul style="list-style-type: none">• This is an opportunity to share your honest thoughts and opinions• This is an opportunity to listen and learn from each other• Disclaimer: The objective of these dialogues is to learn from our employees' areas that present challenges or areas that provide opportunities for improvement related to our safety processes and procedures. It is also to understand better what is going well regarding our safety culture. Information gathered during these sessions is not intended for bargaining purposes or to interfere with your relationship with the union. Should changes or enhancements that fall under mandatory subjects of bargaining be required, the Company will discuss further with the Union. Your participation in these dialogues is voluntary.	<p>DESIRED OUTCOME</p> <ul style="list-style-type: none">• To understand current state and people's thoughts and opinions around safety at SoCalGas• To explore how individuals/teams support employee, contractor, public and infrastructure safety• To gather actionable insights on how to build/integrate safety into our activities	<p>AGENDA</p> <ul style="list-style-type: none">• Welcome/Opening Remarks• Introductions & Log-in/Warm Up Question• Dialogue Questions/Prompts• Closing Remarks• Optional Survey: https://forms.office.com/r/7guF5yK22A
<p>ROLES/RULES</p> <p>Facilitator - will be taking notes, no names will be included in final report when sharing themes & take aways</p> <p>Participants – engage and participate, be respectful to others</p> <p>Everything said <i>should</i> remain confidential</p>	<p>TIME</p> <p>1.5 hr. (90 mins)</p>	<p>SAFETY FORWARD A SoCalGas Program</p>

Dialogue Purpose: facilitators were provided with additional information regarding purpose to ensure they were equipped and comfortable with answering any follow up questions from participants.

- Understanding Current State - Understand people's thoughts and opinions around safety at SoCalGas.
- Exploring Our Role in Supporting Safety - Broaden and expand people's understanding of safety and how departments support each other. Explore how individuals and teams directly or indirectly support employee, contractor, public and infrastructure safety.

- Discuss Future State - Gather actionable insights on how to build these safety concepts (employee, contractor, public and infrastructure) into activities.

Dialogue Prompts: facilitators were provided with dialogue prompts and possible follow up questions to encourage deeper exploration.

1. In your view, what role do you play in safety? Why do you say that?
 - a. If only one aspect of safety is mentioned ask how other aspects of safety (public, infrastructure, contractor, employee) may be impacted by their tasks/job.
2. What does SoCalGas' emphasis on safety look like to you?
 - a. Why do you think that?
3. How would you describe your communication with your supervisor/management?
 - a. What can you talk about?
 - b. *If needed - what can't you talk about? Why?
4. What are the biggest challenges to getting your job done?
 - a. Why do you think they exist?
5. What things work really well at SoCalGas?
 - a. How do they/this relate to safety? Why do you think so?
6. In what type of situations are the policies or guidelines not clear?
 - a. Why do you think that is? How do you proceed?
 - b. *If applicable - how do wish it would be?
7. How would you describe the differences between SoCalGas contractors and employees with respect to their approaches to safety?
 - a. Why are there differences (if any)?
 - b. *If needed - can you please provide an example what it can look like?

Log-out Questions/Closing Remarks: facilitators asked participants a log-out question of their choice. They also let participants know what they can expect to come next.

Example Log Out Question (Facilitator choice):

- Name one thing that surprised, encouraged, or inspired you.
- Name one thing you learned from today's dialogue.
- Name one thing you would want to make sure is done as a result of today's dialogue.
- Is there anything we did not cover that we should look into outside of this session?
- What did you appreciate about today's dialogue?
- What was something that surprised you about this meeting?

Next Steps: participants were reminded that what employees said during the dialogue sessions should remain confidential. Participants may share their own experiences with their peers. Facilitators also let participants know that data from all dialogue sessions will be collected and consolidated to identify themes and areas that require attention. Consistent themes, concerns and challenges will be shared

with the organization and no names will be included in reporting. Additionally, Safety Organization along with other key stakeholders will work to develop next steps; this will be communicated as well.

Responses to Possible Participant Questions: facilitators were provided with background information and example responses to potential questions they may receive from participants.

1. What is the difference between Safety Management Systems (SMS) and Safety Forward?
 - Follow Up Question/Humble Inquiry
 - Does anyone here know the difference? Have you had your leadership talk about SMS or Safety Forward with you? What was shared?
 - Information
 - SMS is an overarching approach to safety that focuses on minimizing and managing risks.
 - Safety forward is an effort within our SMS that is focused on people, culture, and continuous learning.
2. How is this different than 2EC Focus Groups? Why am I here and how are these dialogues different?
 - Follow Up Question/Humble Inquiry
 - Did anyone here participate in the 2EC Focus Group? Is anyone aware of the results of the 2EC Assessment? What did it say?
 - Information
 - In 2021, SoCalGas underwent an assessment of our safety culture led by an independent consultant – 2EC. As part of the assessment, 2EC conducted focus groups with our employees to learn about our company culture.
 - Unlike the 2EC focus groups, these dialogues are not an assessment of our culture. These are designed to listen, learn, and partner with all of you on ways that we can improve our approach to safety.
3. How are these different than learning teams?
 - Follow Up Question/Humble Inquiry
 - Has anyone here heard about Learning Teams? What do you know or what have you heard?
 - Information
 - Learning Teams and Dialogues are similar - they are both an opportunity to learn from our employees on what is working and what is not, so that we can improve together.
 - While the intent is similar, Learning Teams are more focused, whereas Dialogues are more exploratory. Learning Teams are intended to learn about and identify changes and improvements related to specific incidents, conditions, environments, etc. Dialogues are more open and designed to explore safety more generally.
4. I feel like we have already expressed our concerns and challenges to Leadership many times - what can we expect to come out of these dialogues that is different than what has been done in the past?
 - Follow Up Question/Humble Inquiry
 - When you have expressed concerns, what have you been told? Has anyone seen meaningful organizational action in response to their questions/concerns? What did that look like?
 - Information

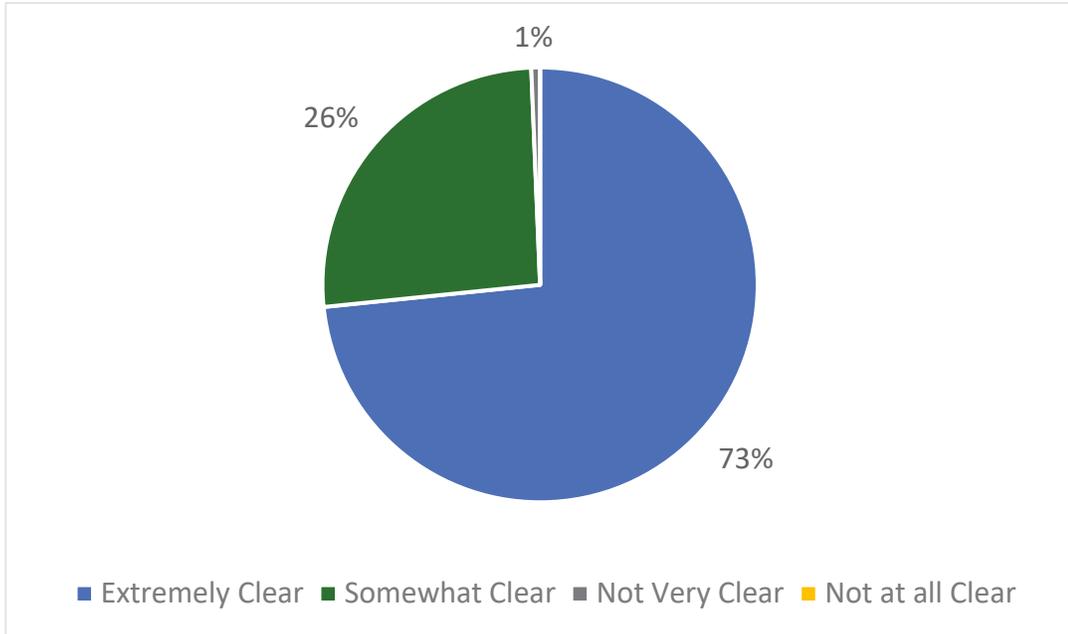
- Our goal is to collect data from across dozens of dialogues to identify consistent themes, concerns, challenges, and issues. Once done, we plan to communicate what we learned and next steps out to the organization so that we can collectively learn from this effort and share our next steps.
- 5. We need more money/more personnel – we are working overtime because we don’t have enough resources/aren’t filling?
 - Follow Up Question/Humble Inquiry
 - Have you raised these concerns to your leadership? What was the response? Has anyone had similar or different conversations? What occurred?
 - Information
 - As a later part of Safety Forward, we do plan to assess our resource allocation practices making sure they align with our safety goals. That said, if you believe work cannot be performed safely, please Stop the Job so that work can be evaluated and performed safely.
- 6. Are we only doing this because the CPUC is making us do it (check the box)?
 - Follow Up Question/Humble Inquiry
 - What experience have you had with our regulators? How do our regulatory obligations influence your work?
 - Information
 - We do have an open regulatory proceeding related to our safety culture. Safety Forward was developed in response to that proceeding and several other recent assessments of our approach to safety. That said, Safety Forward reflects our own internal approach to what we think would be most effective - using employee dialogues, collaboration, and self-reflection to further evolve and improve our safety culture.
- 7. What is Safety Forward, what does it do and how does it affect me?
 - Follow Up Question/Humble Inquiry
 - Have your leadership talked to you about Safety Forward? What was shared?
 - Information
 - Safety Forward is a company-wide commitment to enhance our safety culture. It is rooted in the idea that we are all safety leaders. Safety Forward is about shaping our culture and mindset by having open conversations, listening to learn, improving, and empowering others.

APPENDIX D

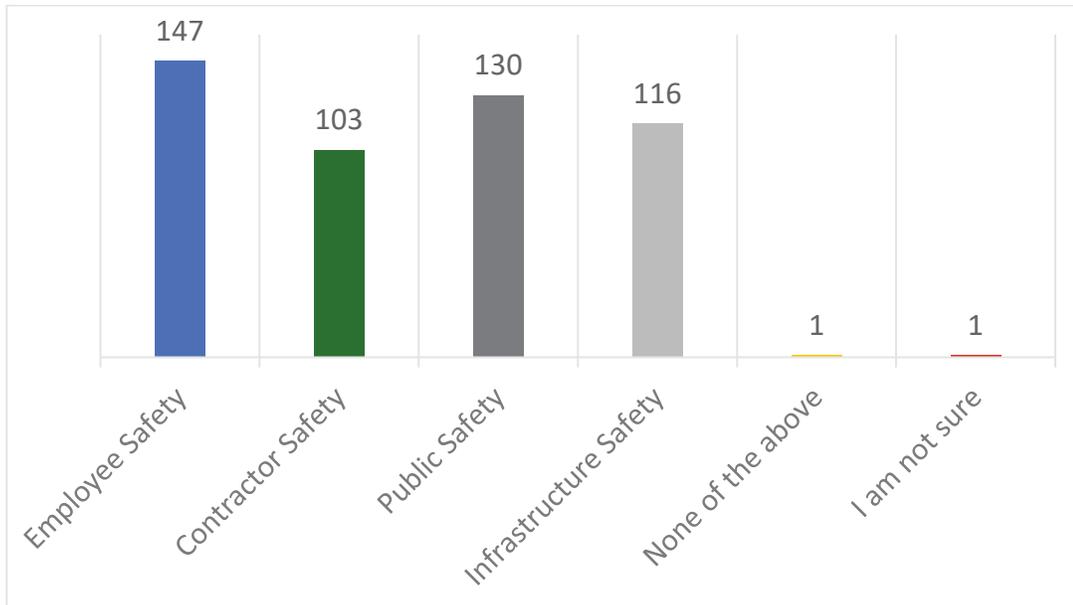
D.1 Post-dialogue Survey Questions and Results

Participants were asked to complete an 8 -question survey after participating in the dialogue.

QUESTION 1: The role I play in safety is clear.



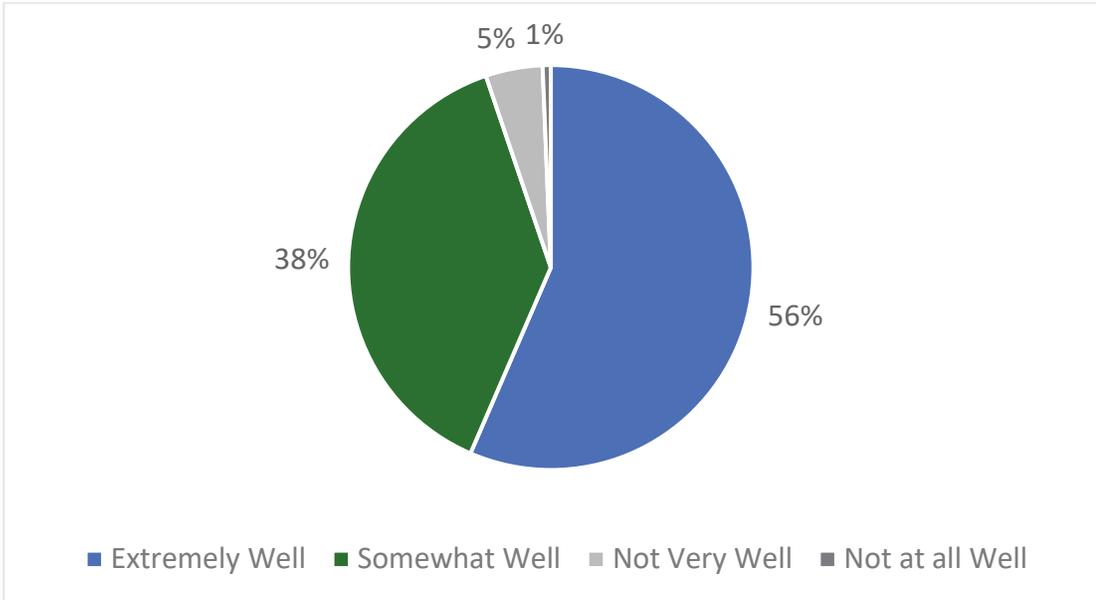
QUESTION 2: The work I do impacts (select all that apply):



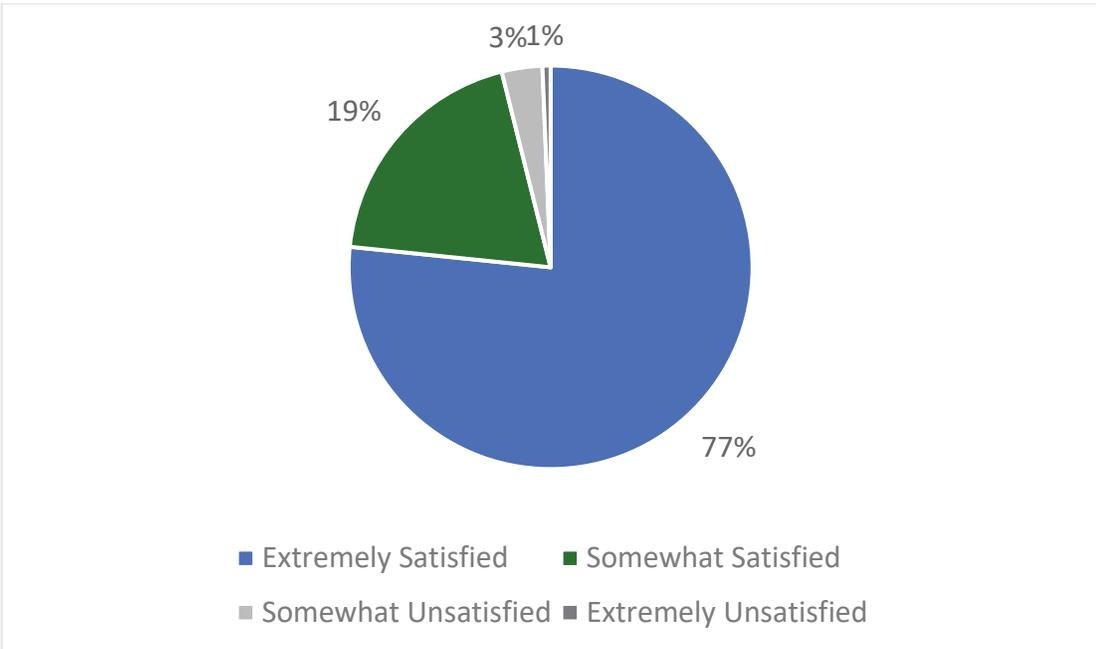
QUESTION 3: How well do you understand the concept of comprehensive safety?

**SAFETY
FORWARD**

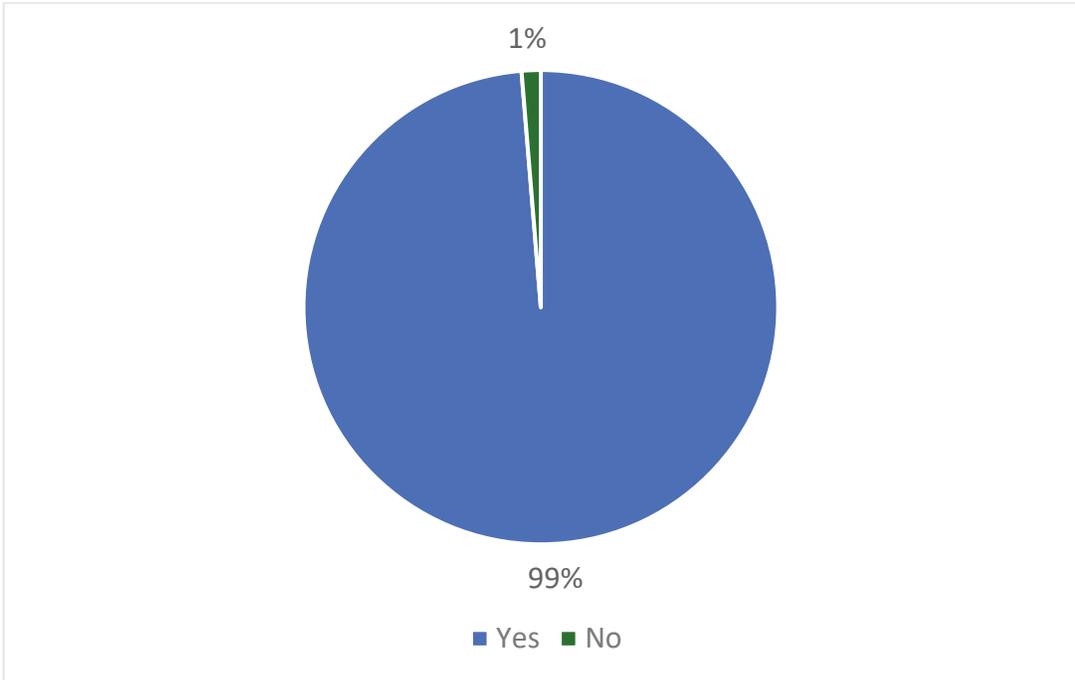
A SoCalGas Program



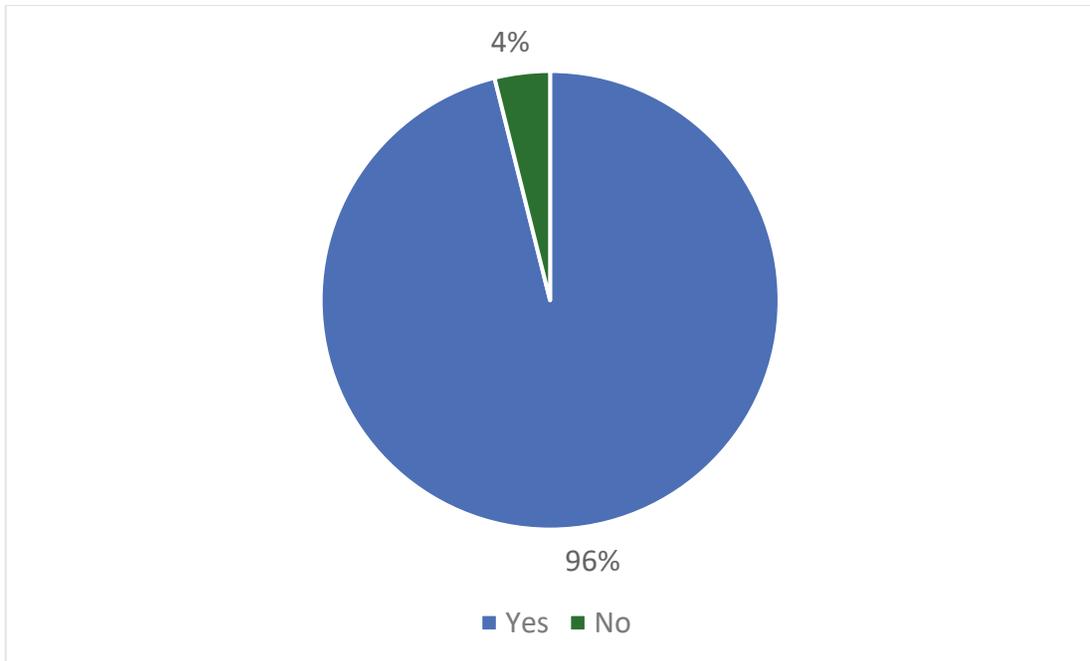
QUESTION 4: How satisfied are you with the dialogue session you participated in?



QUESTION 5: Would you recommend participation in future Safety Forward dialogue sessions to a peer?



QUESTION 6: Would you be interested in joining future Safety Forward dialogues?



QUESTION 7: Is there any feedback you would like to provide on how we can promote a comprehensive approach to safety?

Results & Future Change

Felt Heard

Employee Perspective

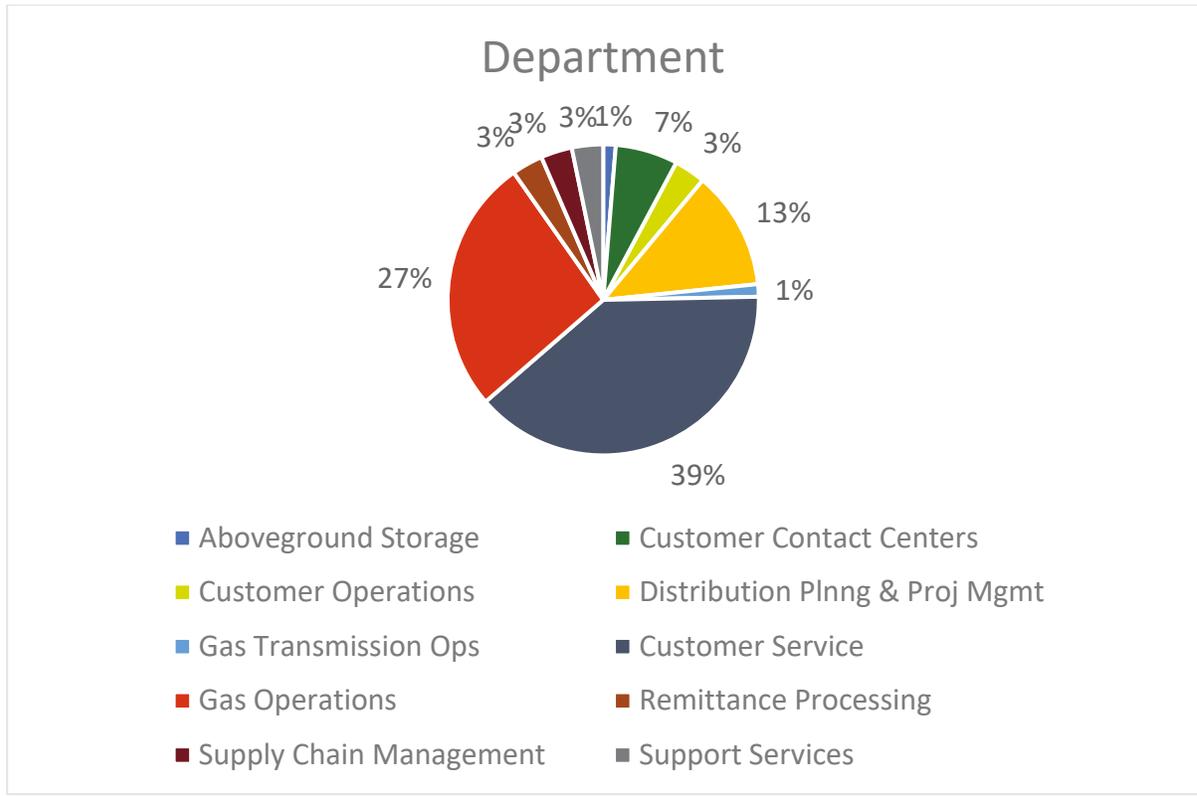
Time

Structure

Comfortable

QUESTION 8: What is your department?

Represented departments from 154 total respondents:



Six of the union represented departments were not represented in the post-survey data.

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