Paper No. SPE 166315

Improving EH&S Practices during Turnarounds in Facilities and Plants: A Process of Knowledge Capture and Transfer worth Implementing

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Introduction

- Projects of all types represent an increasingly significant challenge
- They also offer an increasingly significant opportunity.

- EH&S issues faced in previous projects should be part of the recipe for the success of future projects
- What we do today, should improve tomorrow.
Remember when?
But what if?
What if you could?

- Increase productivity /decrease schedule by eliminating delays
- Effectively utilize knowledge to improve future projects
- Increase safety “buy in” by making it easier to get the “job” done
- Transform safety from a cost center to a profit center
Pre-Planning: Needs Assessment

The Needs Assessment is a process used to review the work with key plant management stakeholders to get a clear understanding of the role each one plays.

- Identify areas likely to generate unplanned work.
- Prepare readiness plans before unplanned work becomes an issue.
- Seamless integration of custom fit plan into existing turnaround plan.
- Identify peak load requirements for equipment and personnel.
- Build confidence and trust between provider and contractors.
Pre-Planning: Needs Assessment

Unplanned activities can result in delays, equipment or manpower shortages and increased cost.

Companies that don’t track utilization of resources from previous turnarounds, suffer the consequence of not knowing why these changes happened.
Pre-Planning: Needs Assessment

For safety system service providers, the data gathered during execution is not only useful during project close out.

Data will help:
- drive efficiencies
- provide actionable information
- predict potential problems during the day-to-day life of the project.
Execution Phase

Key areas for tracking during execution:

- Equipment utilization and deployment
- Equipment reliability
- Resource utilization and deployment
- Finance – cost tracking/reporting
- I/A and near Miss reports

The process used to capture this data must be communicated and acknowledged in the Needs Assessment phase as these will be the same systems that will help manage the day-to-day activities during the execution phase.
Execution and Completion: Stewardship Report

- Presents long term comprehensive strategy for information flow and technology innovation driven by customer feedback.
- Ensures that lessons are learnt, mistakes avoided and successes repeated.
- Proposes actions and solutions, discussed and documented for implementation prior to the next project.
Execution and Completion: Stewardship Report

- Examines and evaluates how the contractors and company personnel performed during the project.
- Provides unbiased, objective recap of everything.

✔ What worked

✗ What didn’t work
Obtain detailed, daily data on the usage rates, outstanding rental items and equipment utilization.

Monitor usage throughout the project, but also it very valuable for planning future work with similar scope.
The Learning Loop

Where most stop learning

✓ True Transfer

- Review report during needs assessment
- Identify changes
- Create solutions
- Implement learnings

Next turnaround (Stewardship Report TM + Previous Needs assessment)

- Identify gaps
- Set expectations
- Build relationship
- Plan for changes

Current turnaround Planning and Preparation (Needs Assessment)

Current turnaround Close-out/Review (Stewardship Report TM)

- Communicate findings
- Gain agreement
- Identify solutions
- Retain knowledge

Current Turnaround Execution (Data Gathering)

- What and how to collect
- When to report
- Who to communicate

APOGCE
What makes a Learning Organization

- Needs Assessment
- Problem Solving

- Experimentation/Innovation

- What has happened to other people
  - Learning from own Experience
  - Learning from other's Experience
  - Stuff that happens to you

- When you actually apply your lesson
  - Knowledge Transfer

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Summary

✓ Create and maintain a learning loop, not a learning line!

✓ Engage the SMEs to gain current and industry project knowledge

✓ It's not really knowledge until it’s used!
Acknowledgements/ Thank You/ Questions

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Works Cited