

A Charter For The Process Safety Management Study

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The PSM study is intended to:

- Assess the general state of process safety implementation, and the condition of process safety information in the North American petrochemical refining industry.
- Assess the participant's process safety implementation, relative to that of other study volunteers.
- Assess the participant's awareness of organizational culture's relationship to successful process safety implementation and the maintenance of process safety information.
- Provide a current snapshot of process safety conditions and trends, that can be used to guide product development.
- Identify any other issues that cause concern, or that indicates a significant trend.
- Identify the ways that personnel currently use information for communicating and learning about process safety management and related issues.
- Provide an anonymous process that enables volunteers to openly discuss these questions while protecting themselves and the facility from misuse of the information they offer.

Methodology

MetaPower has engaged a professional call-center to contact facilities and identify individuals interested in participating in the study. Participation will be voluntary. A telephone interview will be scheduled with a knowledgeable MetaPower researcher who will conduct the interview and document the needed information. The researcher will use a questionnaire to guide the discussion. The questionnaire is intended to elicit the participant's opinions about process safety and related issues. Completing the questionnaire should take 30 minutes or less. Participants will be asked to identify any additional issues for MetaPower to address as part of this or other studies.

Results & Confidentiality

Once interviews are complete, the information will be analyzed and packaged for participant review and publication. If requested during the interview process, participants will receive a draft report for review prior to publication. The results will be presented as a statistical or numerical accounting of the responses. Additional information collected during conversation with the participants will be included in the report. The report will not identify the facility or the individual that participated unless written permission is given. MetaPower will maintain the facility and participant information in accordance with our Privacy Policy. MetaPower will execute a confidentiality agreement if the volunteer needs it. For more information about MetaPower, this study, or the Privacy Policy, please visit the web site, or contact us at 1-800-328-9774 or info@metapower.com.

Sample Process Safety management Questionnaire

Date: _____

Note: Before conducting the actual phone interview, we may request your permission to make an audio recording of the session freeing us from taking extensive notes and speeding up the interview process. The recording and any information provided will be held in the strictest confidence.

1. What is your Name? _____
2. What is your Company? _____
3. What is your position? _____
4. How long have you had this position? _____
5. What is the name of the facility where you work? _____
6. How old is the facility? _____
7. What is the daily processing capacity (crude oil distillation)? _____ bbl/cd
8. What are your facility's main refined products? _____
9. For the last 90 days your facility operated, how many incidents were reported? _____
 - How many involved injuries? _____
 - How many were environmental incidents? _____
10. Are you tracking PSM incident statistics? _____
11. How many were hazardous substance leaks (boundary breaches) _____

Facility PSM Elements

12. Does your facility have a program based on OSHA's Process Safety Management (PSM) of Highly Hazardous Chemicals Standard (29 CFR 1910.119)? Yes/No _____
Comments: _____

13. On a scale of 1 to 10 with 1 being ineffective and 10 being highly effective, how effective has your implementation of the following PSM elements been? What was/is the biggest problem with each element? _____

- Process Safety Information (PSI) _____
- Employee Involvement _____
- Process Hazard Analysis (PHA) _____
- Operating Procedures _____
- Training _____
- Contractors _____
- Pre-Startup Safety Review _____
- Mechanical Integrity _____
- Hot Work Permit _____
- Management Of Change (MOC) _____
- Incident Investigation _____
- Emergency Planning and Response _____
- Compliance Audits _____

Trade Secrets _____
Comments: _____

14. You've indicated the following PSM elements are problems. What have you done to either correct them or make improvements and how successful have they been? (List elements separately)

Element: _____
Improvement Activity _____

Element: _____
Improvement Activity _____

Element: _____
Improvement Activity _____

15. Do you track PSM incident statistics by the element cause/deficiency? _____
Comments: _____

16. Do you currently use a corrective action program to track and correct element causes/deficiencies?
Yes/No _____
Comment: _____

PSM Documentation

17. On a scale of 1-10 with 10 being the best, how trouble-free is the equipment at your facility?
(For example, how well does the equipment operate and how incident free and reliable is it?)
Response: _____
Comments: _____

18. On a scale of 1-10 with 10 being the best, how supportive are your equipment processes at your facility?
(For example, how well do the processes supporting equipment operate?)
Response: _____
Comments: _____

19. What percent of the incidents are due to deficiencies in documentation or procedures?

Response _____%

Comments: _____

20. What efforts have been made to improve the plant documentation? How successful were those efforts?

Comments: _____

21. If you've conducted an effort to improve your process documentation did you use internal resources or contractors?

- Internal Resources for Project Management
- Internal Resources for Technical Expertise
- Internal Resources for Labor
- Contractors for Project Management
- Contractors for Technical Expertise
- Contractors for Labor

Comments: _____

22. If you relied on internal resources, did you establish a dedicated PSM team for the improvement of PSM-related documentation?

Response _____

Comments: _____

23. On a scale of 1-10 with 10 being the most formal, how formal is the Management of Change Program at your facility?

Response: _____

Comments: _____

24. On a scale of 1-10 with 10 being the highest, how effective is your MOC process in keeping process documentation consistent with the physical installation?

Response: _____

Comments: _____

25. Is your MOC process always applied where and how it is needed? Yes/No _____
Comments: _____

26. What software is used to support your MOC Process?

Response: _____

Comments: _____

27. How satisfied is the organization with the software?

Comments: _____

28. If software is not used, are you considering a software package? Yes/No _____

If so, which package?

Comments: _____

29. How does your facility manage the conflict between safety and production?

Comments: _____

30. On a scale of 1 to 10 with 10 being the highest, how successful is this effort to manage the conflict between production and safety?

Response: _____

Comments: _____

Facility Safety & Culture

31. How do you define organizational culture? Is this different than the facility definition?

Comments: _____

32. On a scale of 1-10 with 10 being the highest, how effective is the safety culture at your facility?

Response: _____

Comments: _____

33. What employee behavior, attitudes, beliefs or expectations inhibit the maintenance of quality plant documentation?

Comments: _____

34. On a scale of 1 to 10 with 10 being the highest, how do you perceive fellow employee commitment to Process Safety?

Response: _____

Comments: _____

Additional Issues & Questions

35. Are there any issues that cause you concern or indicate a significant trend? We may need to get back with you to research some of these other issues.

Comments: _____

36. Is there anything you would like us to include in this research?

Comments: _____

Communication & Information

37. What is your best source for information about Process Safety? Please rate the following information channels on a scale of 1-3.

Rating	Examples
_____	Conferences, _____
_____	Web Sites, _____
_____	Internet Blogs, _____
_____	Consultants, _____
_____	Magazines, _____
_____	Company Intranet, _____
_____	Company News Letter, _____

38. What is your best source for information about the industry? Please rate the following information channels on a scale of 1-3.

Rating	Specific Examples
_____	Conferences, _____
_____	Web Sites, _____
_____	Internet Blogs, _____
_____	Industry Connections, _____
_____	Magazines, _____
_____	Company Intranet, _____
_____	Company News Letter, _____

39. Can you recommend any books or papers as good references on Process Safety?
Comments: _____

40. Do we have the best way to contact you if we have more questions or need clarifications?
Comments: _____

41. Would you like to review and comment on a Draft Report from this research? Yes/No _____
Comments: _____

42. How should we send you a digital copy of our report to you?
Comments: _____

This completes the Questionnaire

My name is _____ . You can contact me at _____ . If anything comes to mind later or you have any further thoughts about this study. Thank you for your cooperation and candor.

Interviewer's Notes: