HOW TO

Implementing an OPS Assessment

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The purpose of an Organizational Process Safety (OPS) assessment is to determine an organization's maturity level, in practice, when it comes to managing process safety risks. The emphasis on the practical aspect means that the assessment is not an exercise in auditing a paper Process Safety Management (PSM) system, should such a system exist. Instead, the OPS assessment team spends most of its time interviewing personnel at different levels in the organization and visiting facilities rather than reviewing documents, although some documentary evidence will need to be reviewed. The assessment targets the elements and workstreams identified in the CCPS (Center for Chemical Process Safety) risk-based process safety model. Figures 1 and 2 summarize the assessment process, from start to finish.

Engagement Planning and Preliminary Information

The process begins with engagement planning, where DEKRA and the client agree on the assessment's scope and objectives. This planning may include:

> Scope: which facilities, facility, or part of a facility will be assessed; which elements in a system–all or only a few, etc.
> Objectives: what does the client hope to achieve with the OPS assessment.
> Sampling philosophy: a discussion of which should be used in the case at hand.

The client will also need to supply some preliminary information, including:

> Location of the facilities.
> Layout drawings.
> The description of the facility or facilities to be assessed, and the types of processes performed, and products manufactured there.
> Contact people at the facilities.
> Access information (PPEs, induction, specific requirements).
> Any temporary restrictions (e.g. holiday periods), or preferred periods to conduct the assessment.

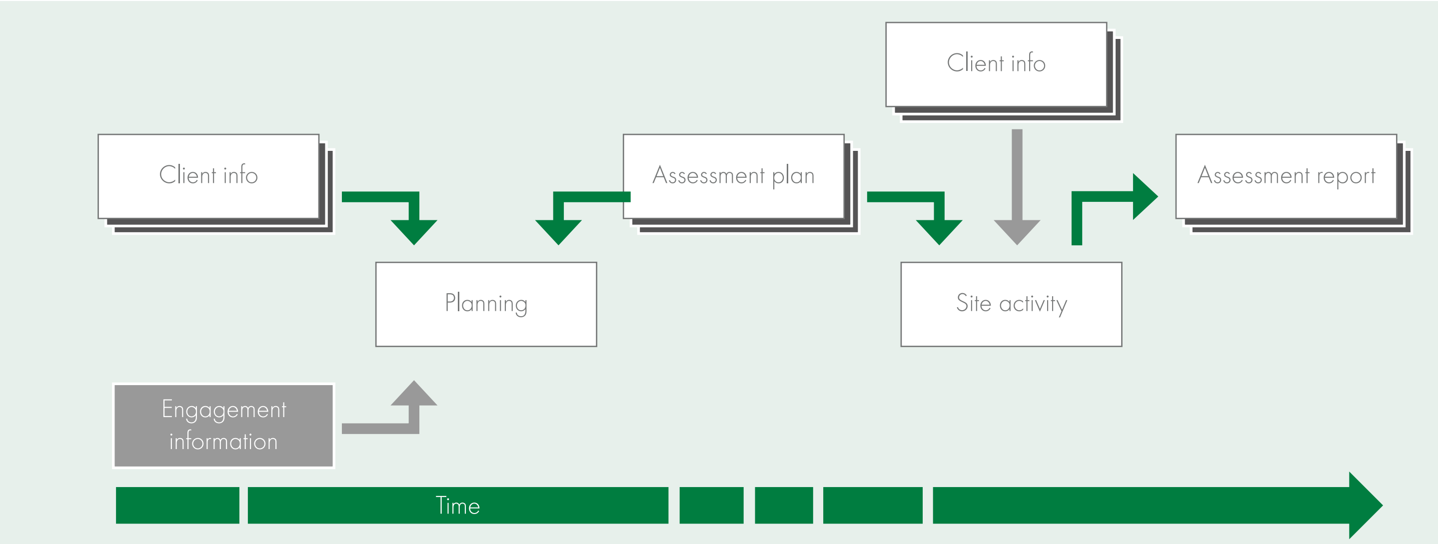

Figure 1. General timeline of the assessment process

Creating and Carrying out the Assessment Plan

Taking the engagement and preliminary information into account, the DEKRA project manager prepares the assessment plan as shown in Figure 1.
Once the assessment plan is available and has been approved by the client, the site activities (which are the core of the assessment) can proceed as schematized in Figure 2:

The very first activity on site will be a kick-off meeting. After that, the assessment activities start in earnest, including:

> Document review.
> Interviews with key personnel.
> Site visits.

After the required information has been gathered (and not before) the team proceeds to assess the OPS maturity of the site/organization using the digital scoring tool developed by DEKRA.

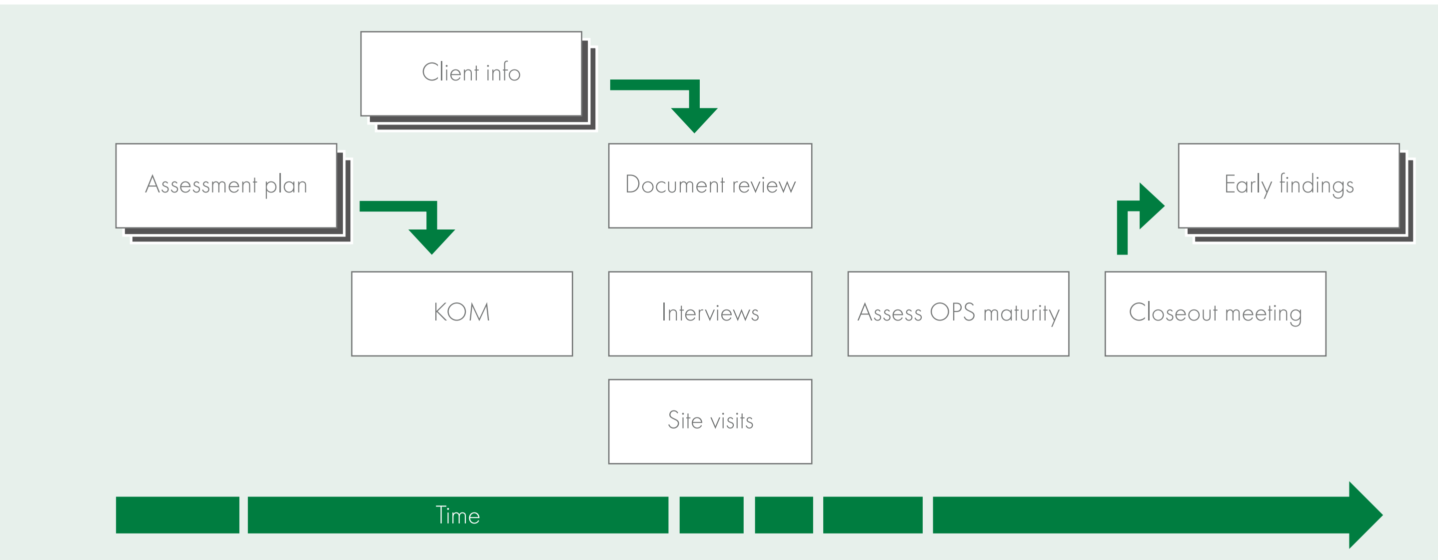

Figure 2. Timeline of the site activities

Sharing Results

The on-site portion of the assessment concludes with a closeout meeting, where the team meets again with the client representatives to share early findings.
After leaving the site, the team writes the final report, including:

> The result of the assessment: the strengths and weaknesses observed in each workstream and element.
> The interventions recommended in order for the organization to progress in OPS maturity.
> The KPIs recommended to measure progress until the next assessment.

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Dr. Arturo Trujillo is Global Director of Process Safety Consulting. His main areas of expertise are diverse types of process hazard analysis (HAZOP, What-if, HAZID), consequence analysis and quantitative risk analysis. He has facilitated more than 200 HAZOPs over the last 25 years, especially in the oil & gas, energy, chemicals and pharma industries.

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