

# When the Status Quo Is Not Good Enough... *Call In The Experts*

Process safety (PS) performance can plateau, or even decline over time. Boards of Directors, regulators, investors, and the public increasingly require confidence in high standards of PS performance. The extensive experience and objective opinions of knowledgeable outside experts can be invaluable in evaluating your PS programs, defining improvement opportunities, and providing confidence to leadership that PS can be well-managed. Indications that your PS program may need assistance include:

- Serious PS events, even though internal audits often find few or no PS program weaknesses,
- Lack of organizational alignment on PS goals,
- Cultural disparities caused by mergers and acquisitions,
- Incident investigations not identifying true root causes,
- Staff lacking the time, resources, or support to fulfill their PS responsibilities,
- Weak sense of vulnerability for major hazards,
- An increase in process safety near misses,
- A lack of enthusiasm for, or confidence in, the organization's PS goals and practices.

Our group of experts has developed, and proven, an approach for conducting comprehensive, probing evaluations of PS capabilities, looking at the company's:

- Professed values and goals for PS performance,
- Leadership accountability and incorporation of PS performance targets in business plans,
- Technical assurance systems at all levels of the company,
- Organizational structure in support of PS at all levels of the organization,
- Resources devoted to PS,
- Organizational competencies with regard to PS technologies,
- PS management systems currently in place,
- Willingness to search out and apply learnings to improve PS performance,
- Communications, both up and down the organization and, underlying it all,
- Process safety culture.

Organizational performance is always driven from the top. We start by interviewing executive leadership in both the operational line and in supporting functions. We seek to first understand the expectations for, and the commitment to, PS as evidenced at that level of the organization.

We will continue our interviews down through the organization to the production site level. At a representative number of sites, we will interview key members of the site leadership team and, importantly, a sampling of hourly employees and technical subject matter experts.

Our expert reviews are not limited to only the content and structure of PS programs. We will evaluate the implementation of key PS management system elements through document reviews and field inspections.

At all levels of the organization, we will seek to understand employee perceptions of:

- What the company values with respect to PS performance (and are there conflicts between different levels in the organization?),
- What obstacles may exist to good PS performance, and
- What additional support or resources may be needed to improve PS performance.

At the conclusion of our assessment, we will meet with executive leadership and subsequently report our observations and recommendations. If desirable, this assessment can be conducted under attorney/client privilege.

*Our assessment approach has been validated through application to multinational companies and various process industries, including chemicals, refining, and exploration and production. It can be applied to any industry conducting hazardous process operations.*



## ***Following are biographical data for some of our team members.***



**Walt Frank**  
*Frank Risk Solutions*

- 46 years in industry, 32 years in PS consulting
- PE (Delaware), CCPS Certified Process Safety Professional (CCPSC)
- AIChE and CCPS Fellow, CCPS Emeritus Member
- Assessor for the API PS Site Assessment Program
- Conducted 100+ PS audits and assessments addressing PS programs and culture
- Author/co-author of nine books and approximately 30 papers on PS topics
- Member, CCPSC Managing Committee and NFPA



**Steve Arendt**  
*JSA Consulting*

- 40+ years in PS and risk assessment
- Conducted 300+ PS reviews, risk assessments and audits
- Conducted 40+ HSE/safety culture evaluations
- Led 5+ major accident investigations
- Provided leadership, governance, and culture training to 20+ CEO's and Boards
- ABS Group manager for the BP-Baker Panel reviews
- 80+ articles and books on PS and risk management
- CCPS Fellow, MKOPSC Merit Award recipient, and AIChE Walton/Miller Award winner



**Doug Hobbs**

- 45 years in industry, with 18 years in technical and supervisory roles in refinery and chemical unit operations and 27 years in PS consulting
- Work experience includes maintenance, inspection, engineering, and operations management
- PS work experience includes participating in 66 PSM audits as a mechanical integrity subject matter expert, conducting more than 50 facility siting studies, and completing multiple quantitative risk assessments for LNG plants and offshore installations
- Former API-510 pressure vessel inspector



**Pete Lodal**  
*D&H Process Safety*

- 42 years in industry, with 25 in PS, risk assessment, and loss prevention
- PE (Tennessee), CCPS Certified Process Safety Professional
- AIChE and CCPS Fellow
- Trevor Kletz Merit Award (2013) and AIChE Walton-Miller Award (2016)
- Past chair, ACC Process Safety Committee
- Author/co-author of more than 20 technical papers and books on process safety
- Member of AIChE Board of Directors



**Dave Jones**

- 41 years in industry, with 20 years in responsible PS positions for a major international operating company
- API and CCPS task force chairman on multiple initiatives that helped define and improve PS
- Recipient of multiple industry and company awards for PS leadership
- Author/co-author of over 40 technical papers and publications on PS
- CCPS Fellow and Emeritus Member, major international operating company



**Jack McCavit**  
*JL McCavit Consulting*

- 50 years in industry, with 30 years in operations and technical management, 5 years as the company PS manager, and 15 years as independent PS consultant
- AIChE and CCPS Fellow, Trevor Kletz Merit Award (2011), AIChE Walton-Miller Award (2017), and Texas Tech University Distinguished Engineer
- Committee chair for Guidelines for Risk Based Process Safety and CCPS' Vision 20/20 project
- Baker Panel's Technical Project Manager following BP Texas City explosion



**Charles Samuels,**  
*Operational  
Performance Services*

- 40 years in industry, including implementing PSM programs at six refineries
- Significant experience in plant and corporate level culture change and systems/process improvement
- Conducted 30+ operational/product quality assessments of light product terminals and multiple refinery operational performance/cultural assessments
- Assessor for API PS and Pipeline Safety Assessment Programs
- Past member of AFPM, AIChE, American Management Association (AMA) and API



**Dave Worthington**

- 44 years in industry, including technical and PS support for three major international companies, in both plant and corporate senior management roles.
- Responsible for global implementation/improvement of OSHA PSM and EPA RMP programs
- Certified Safety Professional
- Member of API, AFPM, International Association of Oil & Gas Producers (IAOGP), NFPA, and AIHA
- Chaired and assisted in the development and update of key API Recommended Practices
- Conducted global safety culture surveys

*These assessments are conducted by internationally recognized process safety experts, each with decades of process safety experience in the petroleum, petrochemical, chemical, and related industries.*

# **Improving Process Safety Performance Through Expert Reviews**



***“The only source of knowledge is experience.”***

***– Albert Einstein***

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