PSF
Process Safety Forum
www.p-s-f.org.uk

Operational Guidance

Process Safety Forum

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Contents

1. OVERVIEW

The Process Safety Forum (PSF) was established to provide a platform whereby initiatives, best practice, lessons from incidents and process safety strategy can be distilled and shared across sectors; to influence our stakeholders (including the Regulator); and to drive the process safety management performance agenda.

The PSF directly addresses the recommendation set out in the Buncefield Major Incident Investigation Board (MIIB) recommendation 21:

> *'The sector should put in place arrangements to ensure that good practice in these areas, incorporating experience from other high hazard sectors, is shared openly between organisations.'*[1]

It also provides one of the mechanisms by which good safety leadership within an organisation can be achieved, by:

> *'Sharing best practice across industry sectors and learning and implementing lessons from relevant incidents in other organisations, are important to maintain the currency of corporate knowledge and competence'.*[2]
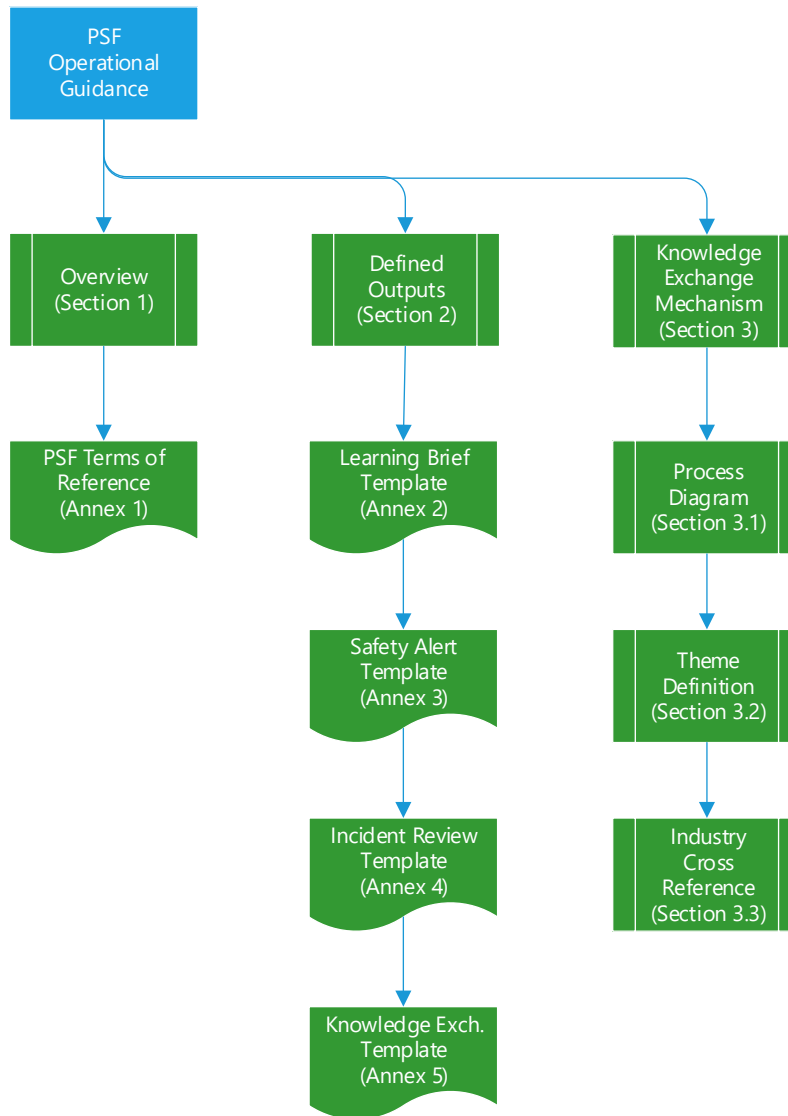
The Terms of Reference for the PSF are included in Annex 1.

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[1] *Process Safety Leadership Group Final Report Safety and environmental standards for fuel storage sites, paragraph 257*

[2] *Process Safety Leadership Group Principles of Process Safety Leadership*

Operational Guidance

1.1. Objectives of this Guide

This document provides the Process Safety Forum participating trade associations and their respective membership with a reference guide to understand the objectives and outputs of the PSF.

Operational Guidance

2. DEFINED OUTPUTS

The PSF produces outputs for the benefit of its member associations and their respective membership. These are also available publicly through the PSF website.

Any information published by the PSF is shared in order to promote learning and improve safety, particularly process safety. Any recipient of this information should carefully consider (and if necessary, seek appropriate guidance on) the relevance, accuracy, and completeness in relation to their circumstances prior to implementation in the organisation.

2.1. Learning Brief

Learning briefs are raised to highlight good practice, refresh knowledge from past incidents or a relevant learning from an incident or near miss from an un-related sector. Trade Associations represented on the PSF will source learning briefs, either from their individual members or other contacts and networks.

Learning briefs shall only be developed as follows:

- Where an originating company has provided the information, the originating company has given permission for the learning brief to be raised by the PSF

  o The originating company is made aware that the learning brief will be publicly available
  o No references to company, site, or location is given (unless authorised by the originating company)
  o The final draft of the learning brief is agreed between the originating company and trade association

- Where information has been sourced from other networks and contacts, the material is already available in the public domain, or the originator has confirmed that it can be shared.

Learning Briefs should be categorised appropriately using the methodology described in section 3. A template Learning Brief is included in Annex 2.

2.2. Safety Alert

Safety alerts are raised following a safety related incident or near miss. Trade Associations represented on the PSF will source safety alerts from their individual members.

Safety alerts shall only be developed where:

- the originating company gives permission for the safety alert to be raised by the PSF
- the originating company is made aware that the safety alert will be publicly available
- no references to company, site, or location is given (unless authorised by the originating company)
- the final draft of the safety alert is agreed between the originating company and trade association

Safety alerts should be categorised appropriately using the methodology described in section 3. A template Safety Alert is included in Annex 3.

2.3. Incident Review

From time to time significant incidents have occurred that warrant a more detailed review by PSF members. Examples of past incidents that PSF has reviewed include the Nimrod XV230 air crash and the Fukushima nuclear reactor incident. In each case the aim is to identify cross-sector learnings for the benefit of PSF members.

In these cases, it is typical that an external review and investigation will take place. Where warranted, PSF will review the lessons and recommendations arising from the external review, to determine:

- if the incident is relevant to PSF represented sectors, and if so

    o are the incident learnings addressed in each PSF represented sector?
    o how are they addressed?

- If there are any gaps in knowledge identified, how can these be addressed?

A template Incident Review is included in Annex 4

2.4. Knowledge Exchange

Queries are often raised by trade associations or their members. These questions are raised to better understand a technical solution, or the general approach taken by industry.

PSF members may benefit from the knowledge available within the wider PSF community when responding to these queries.
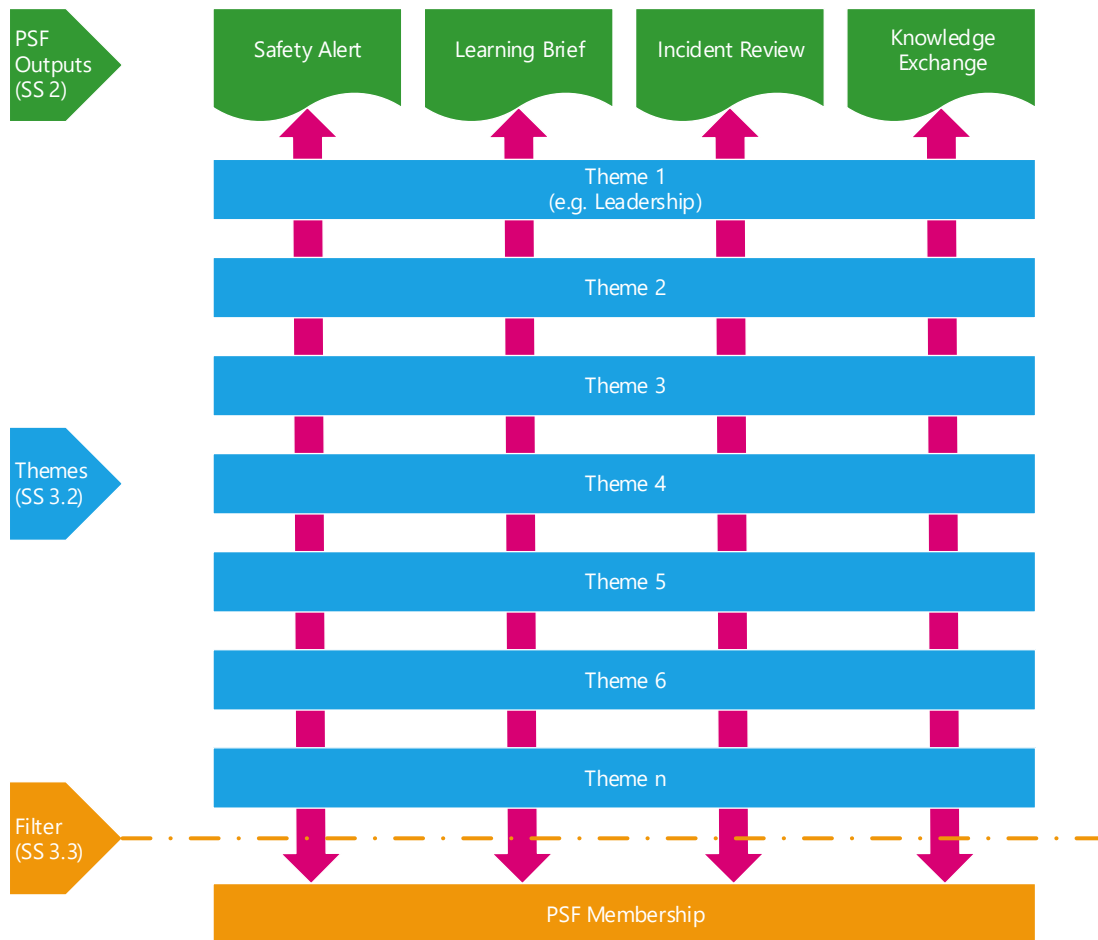
When warranted, the query raised and responses from PSF members will be documented as a knowledge exchange note. This will ensure that information is collated, anonymised and made available for future reference.

A template Incident Review is included in Annex 5.

3.   KNOWLEDGE EXCHANGE MECHANISM

The following sections provide an overview of how information is exchanged through PSF.

3.1.   Knowledge Exchange Process Diagram

Knowledge Exchange Process Diagram

3.2. Knowledge Exchange Theme Definition

Themes is the term applied to the generic description of common topics of interest for the PSF.

	Theme	Description
Plant		
1	Assets - Plant & Equipment (Design)	Plant design including the identification and substantiation of safety critical equipment. Requirements capture. Consideration of specific components but also the system in its entirety. Understanding of design basis, limits & conditions.
2	Assets - Plant & Equipment (Commissioning & Handover)	Active and inactive commissioning. Verification and validation against safety & environmental requirements. Achievable project scheduling. Handover at commissioning from Contractor to Client.
3	Assets - Plant & Equipment (Operations & Maintenance)	Consideration of asset within normal and abnormal operational envelope. Inspection, testing & maintenance.
4	Assets - Plant & Equipment (Decommissioning)	Decommissioning and states leading up to decommissioning - passivation of equipment & post-operative clean out states.
People		
5	Accountabilities	Accountabilities (clear, understood) including organisational structure.
6	Leadership	Leadership for Process Safety performance.
7	Competency	Recruitment. Training (assessment and re-assessment) . Change in competency requirements (organisational change) Knowledge and understanding of the task and associated hazards, corporate memory and succession planning.

	Theme	Description
8	Management of Contractors	Hiring and management of contractors. Intelligent Customer.
9	Human Factors & Procedures	Checks on peoples' performance who perform either physical or mental tasks (supervision, review, verification, validation).
10	Culture	Attitudes, behaviours, discipline, workforce engagement and communication.
Process		
11	Work control & permits	Work control, permitting & authorisation (control and awareness of work activities in the area, and adjacent areas).
12	Management systems	Policy, procedures and instructions (including the full lifecycle; design, operations, maintenance decommissioning). Includes the efficacy of Safety / Env Management Systems and compliance.
13	Hazard & Risk assessment	Hazard identification, risk assessment and risk management.
14	Management of Change	Management of Change.
15	Security (physical, cyber)	Security (physical, cyber).
16	Configuration control	Configuration control (baseline documents, drawings and records of how plant is arranged).
17	Plant status & records	Records of plant / process status throughout lifecycle, including readiness for process start-up.
18	Incident reporting & investigation	Incident reporting & investigation.
19	Performance measurement & management	Performance measurement, Safety Performance Indicators, auditing, management review and improvements.

	Theme	Description
20	Emergency Arrangements	Emergency arrangements (preparedness & response)

3.3. Knowledge Exchange Theme Industry Filter

Industry sectors represented at the Process Safety Forum should apply their own filter on terminology when presenting outputs from the forum to their membership.

ANNEX 1 – PSF TERMS OF REFERENCE

ANNEX 2 – LEARNING BRIEF TEMPLATE

Operational Guidance

ANNEX 3 – SAFETY ALERT TEMPLATE

ANNEX 4 – INCIDENT REVIEW TEMPLATE

ANNEX 5 – KNOWLEDGE EXCHANGE TEMPLATE