WORK PLANNING AND WORK MANAGEMENT
FLOWCHART
COS-3-09

The following flowchart presents a generic Work Planning and Work Management (WPWM) process that can be tailored, as appropriate, for a company’s specific scope of operations. In reviewing this document, the focus should be on assuring that the applicable steps and their expectations are addressed, rather than on the formatting or organization of the steps and expectations.

1. START (WORK - PLANNED & UNPLANNED)
2. TASK REQUIRED
   A. Define the desired results of the task
3. DEVELOP ACCURATE SCOPE OF WORK
   A. Define task steps
   B. Identify needed material, equipment, and tools
4. INCORPORATE APPROPRIATE TASK PLANNING CONSIDERATIONS
   A. Verify compliance with regulatory requirements (i.e., permits, authorizations, criteria for approval)
   B. Verify tools, equipment, and specifications are available
   C. Identify risk assessments to be reviewed (i.e., facility level)
   D. Verify access to operational information (i.e., drawings, vendor and OEM information, etc.)
   E. Agree on applicable interface expectations when multiple companies are involved
   F. Communicate documentation requirements
   G. Communicate work instruction procedures
   H. Understand safe work practices to be used
   I. Define process to respond to deviations and changes
   J. Define stop points and verification steps and methods
   K. Understand contingency and emergency response actions
5. IDENTIFY APPROPRIATE PERSONNEL
   A. Clearly define roles and accountabilities
   B. Verify skills and knowledge of personnel
6. CONDUCT RISK ASSESSMENT
   A. Review previous lessons learned and other appropriate risk assessments (i.e., facility level)
   B. Involve personnel on the risk assessment team that are familiar with the task
   C. Identify credible hazards and consequences for each task step
   D. Incorporate additional control measures and verification steps
   E. Re-evaluate residual risk with controls in place
   F. Compare risk assessments to ensure all risk have been considered when multiple companies are involved
   G. Agree when work can begin (have all risks been reduced to “acceptable” levels?)
   H. Simultaneous Operations (SIMOPS) should be a critical consideration in the risk assessment
7. REVIEW BY SITE AUTHORITY
   A. Ensure that the approval / authorization authorities are communicative with the level of risk
   B. Identify who is responsible for the successful execution of the task
   C. Identify who is responsible for authorizing response to deviations and restart of work including, as appropriate, the site Ultimate Work Authority (UWA)
8. TOOLBOX TALK
   A. Ensure that all personnel involved in task execution review the risk assessment
   B. Conduct an on-site day-of-task review to verify that the risk assessment is still applicable and to identify any additional hazards
   C. Emphasize the obligation to stop work if there are questions or deviations
9. EXECUTE TASK
   A. Verify work is being performed per plan
   B. Dynamically monitor risk as work is being performed
   C. Apply appropriate stop points and verification steps
   D. Ensure work location is left in a safe condition upon job completion
   E. Report incidents and near-misses
   F. Apply Documentation Control processes
10. PERFORM A POST-TASK REVIEW
    A. Identify lessons learned
    B. Identify procedure / documentation improvements
    C. Evaluate personnel performance
    D. Validate the task achieved the desired results
11. COMMUNICATION FOR CONTINUOUS IMPROVEMENT
    A. Share lessons learned
    B. Utilize appropriate change management processes for any identified improvements
    C. Follow-up personnel performance
12. END

Routine work planning and execution is a focus area for all companies engaged in offshore oil and natural gas exploration and production activities. For offshore operations, these often involve critical work tasks that need to be well-planned and orchestrated for their safe and proper execution. The flowchart presented in this guidance was developed as an aid to setting minimum requirements for what a routine Work Planning and Work Management (WPWM) process should involve, as well as identifying key steps to help reduce process safety and personal safety risks. When incorporated into a company’s Safety and Environmental Management System (SEMS), review of this process and resulting activities can also serve as a vehicle for continuous improvement.

An effective WPWM procedure is one that takes into consideration and incorporates, as appropriate, the steps shown in the flowchart. These steps may be supplemented by additional company-specific steps. The procedure needs to be robust enough to support the activities and operations to be carried out and should have a healthy and mature mechanism for continuous improvement. A common theme in many industry studies and lessons learned from incidents is that procedures and personnel training on work planning procedures are paramount for successful work execution and process and/or personal safety.

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