# Pipeline Safety Management System (SMS)

## *Tools Workshop*

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**Tony Cockshutt**
Director Safety and Reliability Governance, Enbridge Inc

**Ann-Marie Hodes**
Strategic Planning & Management System Coordinator, Marathon Petroleum

American Public Gas Association    AOPL Association of Oil Pipe Lines    energy API    Pipeline SMS GROUP    AGA American Gas Association    INGAA

# WELCOME

- Safety Moment

- API Antitrust Statement

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# Workshop Objectives-Making it Real

- Understand SMS tools

- Learn from others SMS experience

- Learn from other industry segments

- Share your experience

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# Overview-Making it Real

- Implementation team progress and tools

- A pipeline safety management system-is and is not

- Maturity model

- Workshop structure

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# Pipeline Industry Implementation Team

## GUIDING PRINCIPLES

*Implementation team's governance for goals & objectives*

1. One Industry, One Goal
2. Improve overall performance (not just safety)
3. It's a journey, not a destination
4. Flexible and scalable
5. Provide tools to assist all operators
6. First conformance, then effectiveness
7. Voluntary implementation equals unlimited results
8. Proactive versus reactive
9. Stay true to SMS API RP 1173 (especially terminology)

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# INDUSTRY IMPLEMENTATION TEAM

## ONE INDUSTRY, ONE TEAM

- Industry Associations
    - API
    - AOPL
    - INGAA
    - AGA
    - APGA  (American Public Gas Association)
    - CEPA (Canadian Energy Pipeline Association)

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# TOOLS & COMMUNICATIONS
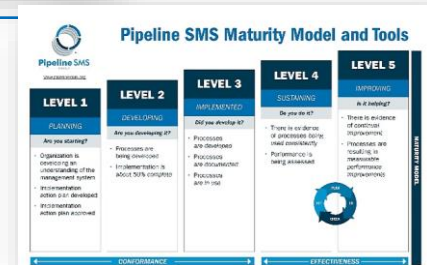
**WEBSITE**

www.pipelinesms.org

Revamped in 2018 to improve functionality

**BOOKLETS**



**TOOLS**



- ✓ SMS Maturity Model
- ✓ Planning and Implementation *gap* assessments
- ✓ Evaluation *effectiveness* assessment
- ✓ Peer-to-peer sharing practices
- ✓ Voluntary API third-party assessment program

**WORKSHOPS & WEBINARS**

- ✓ *Workshops:* Five held in 2107 & 2018, averaged 100 participants
- ✓ *Webinars:* Seven held in 2107 & 2018, averaged 80 participants

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# What is a Pipeline Safety Management System (SMS)?

- A Pipeline Safety Management system is simply a structured method to connect multiple complex activities in a way that:
  - Reveals and manages risk,
  - Promotes a learning environment, and
  - Continuously improves pipeline safety and integrity

- Regardless of where you are on the maturity model, you already have a pipeline safety management system.
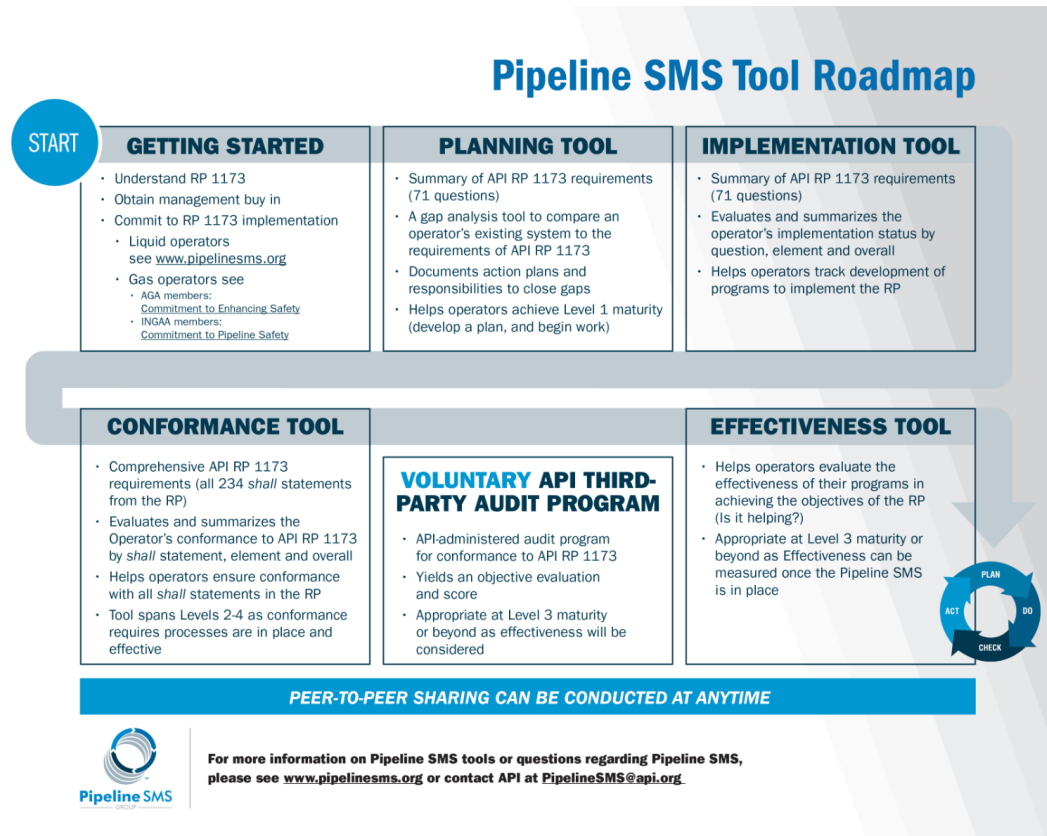
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# What Pipeline SMS is not

- A regulatory requirement — it is NOT incorporated by reference into pipeline safety regulations

- A one size fits all approach

- A one-and-done or check-the-box type of activity

- A quick fix approach to pipeline safety

# Pipeline SMS Maturity Model and Tools

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## LEVEL 1

### PLANNING

**Are you starting?**

- Organization is developing an understanding of the management system
- Implementation action plan developed
- Implementation action plan approved

## LEVEL 2

### DEVELOPING

**Are you developing it?**

- Processes are being developed
- Implementation *is about 50% complete*

## LEVEL 3

### IMPLEMENTED

**Did you develop it?**

- Processes *are developed*
- Processes *are documented*
- Processes *are in use*

## LEVEL 4

### SUSTAINING

**Do you do it?**

- There is evidence of processes *being used consistently*
- Performance is being assessed

## LEVEL 5

### IMPROVING

**Is it helping?**

- There is evidence of *continual improvement*
- Processes are resulting in *measurable performance improvements*

PLAN — DO — CHECK — ACT

**MATURITY MODEL**

← CONFORMANCE →

← EFFECTIVENESS →

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# WHERE DO I START?

# TOOLS IN SUMMARY

| PLANNING TOOL | MATURITY MODEL | IMPLEMENTATION TOOL | CONFORMANCE CHECKLIST | EVALUATION TOOL |
|---|---|---|---|---|
| *A gap analysis tool to compare an Operator's existing system to the requirements of API RP 1173* | *Measures the degree to which the Pipeline SMS is comprehensive, systematic, and integrated throughout an organization* | *Evaluates and summarizes the operator's implementation status by question, element and overall* | *Supplement – contains all API RP 1173 shall statements* | *Helps operators evaluate the effectiveness of their programs in achieving the objectives of API RP 1173* |
| February 2016 | November 2017 | February 2018 | February 2018 | September 2018 |
| | *Webinar:* January 2018 | *Webinar:* February 2018 | | *Webinar:* June 2018 |

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# WORKSHOP STRUCTURE

- Rotating breakout sessions – morning

- Lunch

- Rotating breakout sessions – afternoon

- Review and closing comments

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# Closing

- Identify key takeaways

- Network, network, network

- High level of engagement

- Contacts for future help

- More questions than answers