Building a Sustainable Organization

Operational Sustainability, LLC® (OS), offers a robust framework for managing your most valuable asset, your people. We integrate with the leading HR platforms to easily onboard your employee and contractor information. From identifying potential candidates, assessing competencies, and implementing long-term career development to succession planning, our OESuite™ is the powerfully simple cloud-based solution to manage your workforce.

Introduction to Workforce Enablement

Many companies are expecting higher turnover rates in their workforce in the next 3-5 years. This turnover, or churn, in the workforce, negatively impacts efficiency, safety, quality, and an organization's overall risk profile. According to ARC Advisory Group, 42% of all corporate knowledge is held by employees in personal memory (tacit knowledge). Inexperienced workers lack situational awareness and knowledge of procedures. Empowering your workforce through a cloud-based platform enabling comprehensive and accurate information with business process integration reduces the impact of churn. Increasingly, companies will rely on smart information delivery solutions including process and procedure documentation linked to assets, enabling real-time, risk-informed decisions in the field.
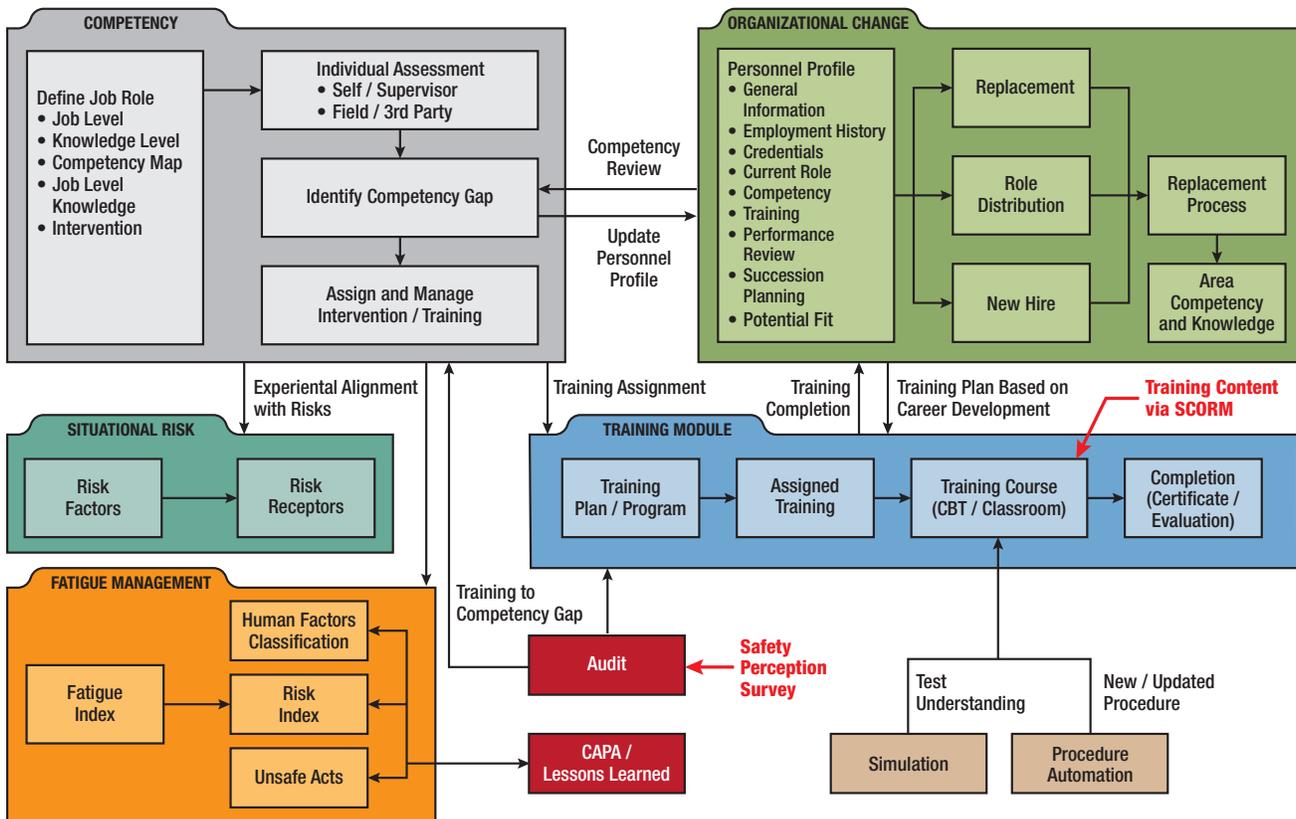

Figure 1 – OS Workforce Enablement Model

OESuite™

Every company needs to know the number of people and the skills required for operating all of the assets in the organization. Our **OESuite™ Workforce Enablement Module** first identifies all needed **competencies** using visual mapping to assess functional qualifications, incorporating categorization, key personnel issues, and anchor positions. Overall competency levels are assigned to each worker. Identified competency gaps are remediated by required training interventions. We create a map that includes *knowledge objects* like equipment or process units. Knowledge objects can be broken down into tasks that must be accomplished to change job levels. The final product is a process that assesses true competency; identifies key positions, knowledge, and gaps in personnel and skills; and surfaces these to management for action. These maps are continually refreshed to ensure that they keep pace with the change in industry. Competencies can be correlated with situational risks (i.e., maintaining a high level of experience in a high-risk area or unit). In addition, as gaps are identified and staffing shortages occur, our software can identify positions that need to be filled first with higher competency individuals (i.e., anchor positions) to have a sustainable flawless operation across all shifts, avoiding staff burnout. These few key positions are effectively the "glue" that holds the operation together, including any contractors and shared-service providers who may occupy anchor positions.

Workforce Enablement is also a powerful, cloud-based resource-scheduling tool to help you avoid excessive overtime, increases in safety risk, and other negative outcomes from unbalanced workforce deployment, no matter the set of tasks facing them. We also identify process safety information that operators and engineers need to improve their competencies in a process plant environment, including control diagrams, procedures, training guides, and more... and we put it immediately available at their fingertips.

Our **Training Module** allows organizations to assign, track, and report on all training activities. Close competency gaps using our integrated, SCORM-compliant learning management solution. We enable self-assessment, cross-assessment by management, and defensible competency audits. Staff can see their entire career development plan with our clear, cloud-based dashboard. Users can build courses from the ground up or choose from over 1000 courses and videos in more than 120 languages. Each department can create a customized, tailored training matrix.

Training can be further broken down into roles from the board room to the shop floor to create accountabilities using RACI methods. In addition, tests can be weighted and scored to ensure rules such as re-tests and waiting periods are enforced. Users are able to demonstrate competency in a sustainable manner. Integration with the OESuite **Incident Module** helps leadership see how investing in training pays dividends through reduced incident rates, and improved visibility of safety and risk culture challenges. Then, our **Compliance Management Module** automates the basis for compliance including adherence to Recognized and Generally Accepted Good Engineering Practices (RAGAGEP).

OS uses its **Audit Module** to document safety perception surveys. Often, a company's ability to improve training is limited by the cultural state of the organization. Resistance to change is one key to gaining buy-in. OS works with company leadership to assess the company culture, and recommend actions as required to support a culture where consistent application of principles and standards is expected and fairly enforced. Once that is achieved, a good "paper" program for operational discipline can be transformed into deeply rooted dedication to carry out the right task, the right way, every time.

The **Organizational Change Module** assists the company's document contractor in managing employee and organizational changes and includes integration with contractor management solutions such as ISNetworld. As staffing needs are identified, key roles can be filled without exposure to unacceptable risks. Plan for new hires, retirements, promotions, and complex interactions such as mergers and acquisitions and staffing during capital projects. Employee credentials, employment history, training history, performance reviews, potential job fit, role distribution, succession planning, and potential candidate status are all tracked.

The **Situational Assessment Module** enables clients to establish a baseline of operating conditions for company assets and to record and track findings, providing an objective assessment. This information should be considered when establishing safety system requirements and the level of mechanical integrity and reliability factored into the design, operation, and maintenance of new and existing assets. In addition, risk can be properly aligned with workforce competency to maximize the experience level of the staff needed for complex assets or high-risk areas.

Our **Procedure Manager Module** allows owners and operators to establish policies and procedures to understand, recognize, and manage fatigue in the workplace, meeting the requirements of API 755. It has been documented that competent staff hampered by excessive fatigue leads to poor decision making and contributes or leads to incidents. The use of prescriptive Hours of Service rules should be supplemented as necessary to prevent unwanted events. Our integrated **Fatigue Manager Module** is a comprehensive framework that allows users to balance workloads
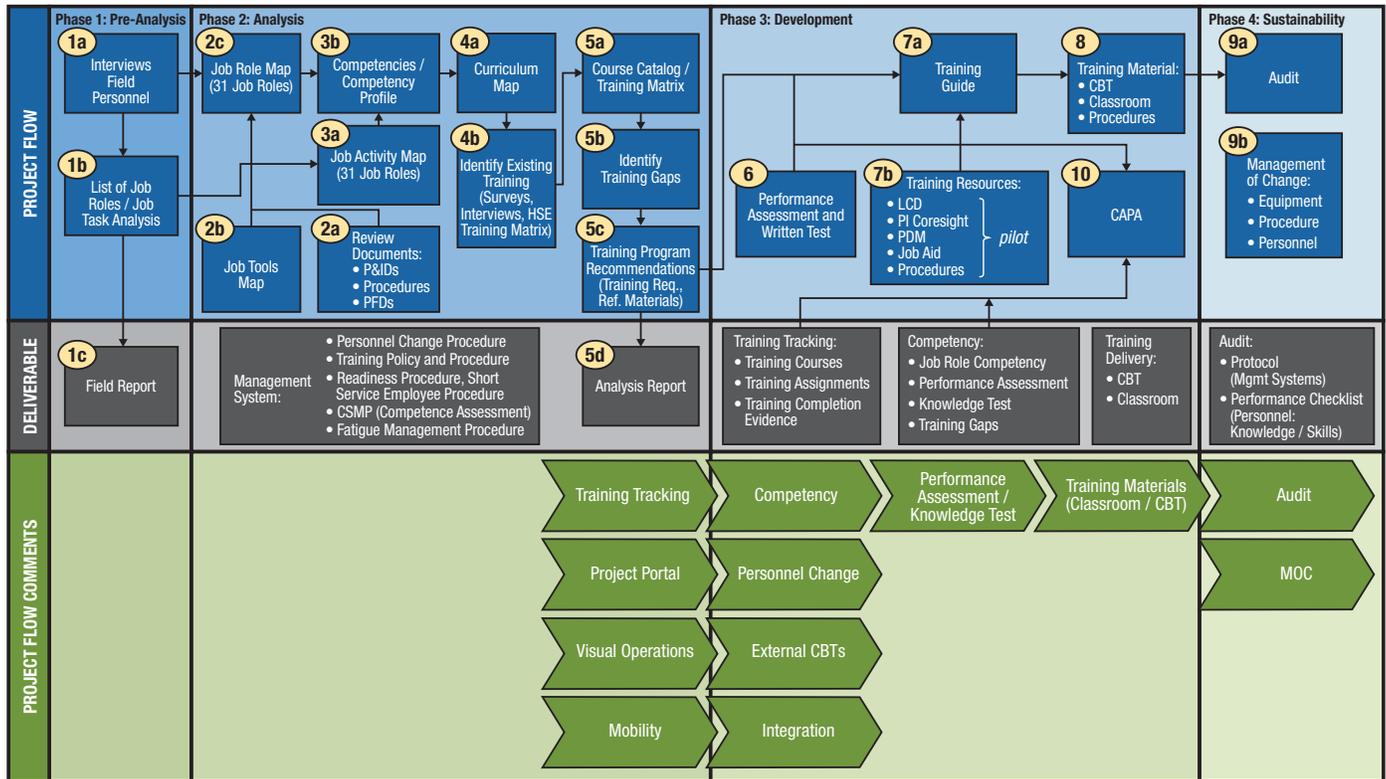

Figure 2 – OS Total Workforce Management Model

for shift, startup, shutdown, turnaround, and emergency or unplanned events. We assess contributing factors leading to accidents and incidents including Organizational, Supervisory, Pre-conditions for Unsafe Acts and Unsafe Acts. Our solution is integrated with our robust **Corrective and Preventive Action (CAPA) Module** to ensure that issues are resolved in a timely manner.

OS Visual Operations enables companies to restructure competency levels down to the unit level to ensure the right personnel are in place to avoid exposure to excessive risks in key areas in the plant and in the field. **OS Visual Operations** covers succession planning and shows users the impact of moving personnel in multiple layers. You can perform "What-If" analyses on the fly to assess if adequate competencies exist, or if you need to realign personnel to cover gaps.

Our **Procedure Module** improves procedural compliance while empowering workers to make cost-effective decisions at the point of work. When abnormal situations happen, operators can quickly address threats while appropriately determining potential consequences to properly prioritize critical tasks. Our **Procedure Module** is integrated with equipment information in our **Inspection and Reliability Modules** and comprehensive operating limit tables in our **Alarm Module**. As the plant configuration changes, we monitor permit constraints in our **Compliance Module** to ensure environmental limits are maintained. If failure onset is detected, the system immediately alerts users to step up inspections as needed and repair, replace, or re-engineer equipment at the right time. Our **Procedure Module** integrates with our **File Manager Module** to allow check-in, check-out, and digital redlining of documents and drawings. All final documents are stored in the **Process Safety Information Module**.
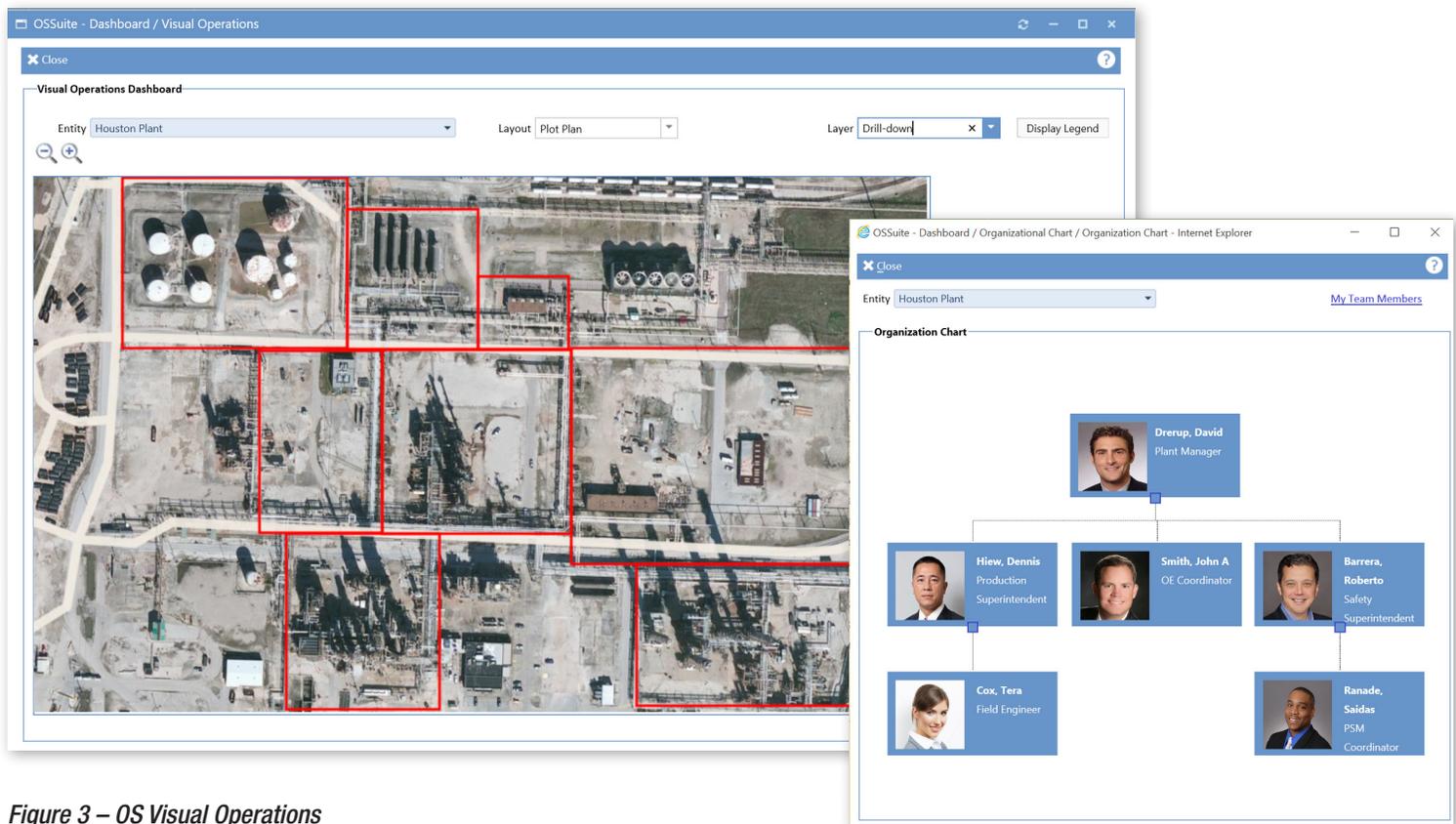

Figure 3 – OS Visual Operations

Mobility is increasingly important to field staff and managers. Our cloud-based, mobile modules provide robust process and procedure information on demand, to any Internet-enabled mobile device. Decision tree logic, tags that reflect current operating conditions, standing production orders, alarm bad actors, and shift notes are all instantly available at the point of need. Intelligent mobility solutions allow operators to view extremely complex information in simplified visual layers based upon roles (e.g., mechanics vs. operators). During idle times, operators can be rerouted to provide assistance and address other needs, further improving availability, reliability, production output and overall safety of the plant.

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