Process Safety Assessment Program
Assessment Team Leader
Qualification Requirements/Roles & Responsibilities

Assessment Team Leader

An Assessment Team Leader shall meet all the qualification requirements for Assessment Team Members (listed above) and meet the following requirements:

A. Qualifications

- Required to have knowledge and/or previous experience with assessments/audits in the refining/petrochemical industry.

- Required to be knowledgeable in process safety systems and their implementation in the site.

- Required to have experience with Process Safety leadership roles.

- Preferred to have specific technical knowledge in aspects of process safety systems.

- Preferred to have previous experience in operations, maintenance and technical management.

- Preferred to have completed an assessment/audit leadership training program.

- Preferred to have an auditing certification.

B. Roles and Responsibilities

- Initial Development of the PS Site Assessment Process

  - Finalize the Process Safety Site Assessment protocols and other documentation and reports prior to the initial round of assessments.

  - Develop a list of Process Safety-competent individuals to participate as assessors. Ensure this assessor list adequately reflects the full range of skill sets that will be required for the assessment process. Proposed assessor qualifications are listed in Attachment A.

  - Coordinate the development of the assessor training program with the API Training and Certification Subgroup.

  - Coordinate the activities of the Assistant Assessment Coordinator as required.

- – Develop a preliminary site schedule for the initial 12 months of the PS site assessment process.

- Coordination and Facilitation of the PS Site Assessments

  - – Ensure that assessment team members have the appropriate safety training and/or certifications.

  - – Ensure that assessment team members have the appropriate security background check required to access the site (i.e., Transportation Worker Identification Credential – TWIC, or other company-required background check).

  - – Finalize the assessment date.

  - – Coordinate staffing of assessment teams.

  - – Communicate travel information to the team.

  - – Work with Site Assessment Coordinator to assemble appropriate pre-assessment package, develop detailed assessment schedule and set up logistical support.

  - – Assures that proper reference materials are available during the assessment.

  - – Assign appropriate pre-assessment homework to team members.

  - – Train and advise assessment team members, as required, on PS site assessment methodology to provide consistency of the process.

- Overall Coordination, Stewardship, and Continuous Improvement of the Process Safety Site Assessment Program

  - – Direct the Assistant Assessment Coordinator as required to ensure the assessment activities are completed effectively.

  - – Develop and maintain a PS site assessment schedule that is preferably planned on a rolling 12-month basis. At a minimum, the schedule should be established at least 6-months prior to the expected assessment date.

  - – Ensure the list of Process Safety-competent team members is up-to-date and adequate to staff the scheduled assessments

  - – Coordinate the pre-planning, execution, and follow-up for each site assessment consistent with Section 4.3.

  - – Collate lessons-learned from the PS site assessment process, suggestions for improving the process and communicate that information to API GIS and the Process Safety Workgroup.

  - – Implement improvements to the site assessment process as needed.

- APM will lead in the development to compile trending and analysis of data for continuous improvement considerations