

BP OIL -- TOLEDO REFINERY

Document Type: Procedure	Refinery Wide	Reference No.: SAF 085
Effective Date: October 4, 2011	Disseminating External Lessons Learned	Revision No.: 3
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SCOPE	This procedure describes the expectations for screening and embedding external lessons learned including High Value Learnings (HVL's), Learning Alerts, Quarterly Learning Bulletins (QLB's), BP Refining MIA/HIPO 1-pagers, Non-Refining BP MIA/HIPO's of significance to the site.
HEALTH Special PPE & Special Hazards	Appropriate evaluation of external lessons learned will enhance the ability of the Toledo Refinery to protect employee and public health.
SAFETY	Appropriate evaluation of external lessons learned will enhance the ability of the Toledo Refinery to protect employee and public safety.
REFERENCE DOCUMENTS	RRP 4.4-0001 Section 3.4 Local Operating Management System Section 2.4
SPECIAL MATERIALS & EQUIPMENT	N/A
QUALITY	N/A
ENVIRONMENTAL	Appropriate evaluation of external lessons learned will enhance the ability of the Toledo Refinery to protect the environment.

OVERVIEW

The purpose of embedding external learnings is to use knowledge derived from experience to preclude the recurrence of undesirable outcomes. Use of lessons learned is a principle component of organizational culture supportive of continuous improvement.

This procedure defines the minimum expectations for evaluating and embedding external lessons learned.

The elements of this process include:

- Identification of applicable lessons learned,
- Distribution to appropriate personnel,
- Identification of actions that will be taken as a result of the lessons learned,
- And embedding of actions to preclude or minimize recurrence of similar events

The following document types will be addressed by this process as a minimum:

- High Value Learnings (HVL's) are issued by S&OR on an as needed basis which must be evaluated and tracked as part of the SIP
- Learning Alerts (LA's) are issued by S&OR on an as needed basis that are evaluated and acted upon as determined to be appropriate
- Quarterly Learning Bulletins (QLB's) are issued by Refining Technology on a periodic basis that are evaluated and acted upon as determined to be appropriate. These contain a variety of topics including external events, MIA's and HIPO's determined to have potential impact on refining practices.
- BP Refining MIA/HIPO 1-pagers
- Non-Refining BP MIA/HIPO's of significance to the site

1.0 Definitions	<p>__1.1 High Potential Incident (HIPO): Any incident or unsafe/unhealthy condition or near miss where the most serious probable outcome is a Major Incident. The incident one page lessons learned summary is used in the Embedding Learning Process, with reference to the full report if necessary.</p> <p>__1.2 Major Incident Announcement (MIA): A health, safety, security or environmental Incident in which the actual severity represents a Level A-D or E impact as defined in the Group-Defined Operating Practice 'Reporting HSSE and Operational Incidents'. The incident one page lessons learned summary is used in the Embedding Learning Process, with reference to the full report if necessary.</p>
2.0 Responsibilities	<p>__2.1 Incident Investigation and Learning Specialist: Person responsible for facilitating the Learning Process</p> <p>__2.2 Learning Forum: A cross function group that meets on a monthly basis to review external incidents (reference Learning Forum Terms of Reference SAF 085-RF01)</p> <p>__2.3 Subject Matter Expert (SME): person or small group who has expertise in the subject matter of the learning subject</p>
3.0 Procedure/Process	<p>__3.1 Incident Investigation and Learning Specialist obtains material from several sources to be used to develop learning opportunities for the Toledo Refinery. These sources include, but are not limited to: Learning Alerts, QLB's, HVL's, Refining HIPO's/MIA's, and Non-refining BP MIA's/HIPO's of significance to the site</p>

- __3.2 The Learning Forum will review and evaluate material obtained by the Learning Specialist and decide if the material is relevant to Toledo Refinery, or if it requires further review/input from a designated SME or from safety discussions in the field. This evaluation is recorded on the **BP Embedding Learning Process Spreadsheet** maintained by the Incident Investigation and Learning Specialist. This spreadsheet can be found at the following link --
https://wss0.bp.com/Toledo_Refinery/HSSE/PSM/Forms/AllItems.aspx?RootFolder=%2fToledo%5fRefinery%2fHSSE%2fPSM%2fRPS%5fCommittee%5fMeeting%5fMinutes%2fLearning%20Forum&View=%7b52778748%2dC323%2d4F3B%2d886F%2dEBCF37B9B700%7d
- __3.3 Proposed actions are developed for Toledo by the committee or by the SME. There may also be no additional action required.

NOTE: HVL's have pre-determined actions and timing for completion of those actions which are incorporated into the SIP and Tr@ction. No additional review is required to develop actions.

- __3.4 If actions are developed by the SME, the committee will review and agree to the proposed actions. Potential actions include: further study, changes to equipment, site technical practices or operating procedures, organization, competency/training programs, and/or targeted safety communications/education. Recommended actions could already be covered by existing programs, SIP activities, etc.
- __3.5 The proposed action(s) are documented on the spreadsheet referenced in 3.2.
- __3.6 Recommended long term actions from the Learning Forum which will require significant site resources to complete (greater than 12 manhours) will be approved by the Refinery Process Safety Committee or appropriately modified. The Incident Investigation and Learning Specialist will present these recommendations on an as needed basis, or quarterly at a minimum.
- __3.7 The final approved long term action items which require significant site resources to complete are documented and tracked in Tr@ction with the appropriate responsible person indicated with the completion date. Remaining action items are tracked by the Incident Investigation and Learning Specialist on the spreadsheet referenced in 3.2.
- __3.8 Actions are reviewed annually to ascertain that they sufficiently addressed the issue under evaluation. The results of this review are also documented in the spreadsheet referenced in 3.2. *Note: This part of the Learning Process will not begin until the second half of 2012.*

Revision History**Revision history**

The following information documents at least the last 3 changes to this document, with all the changes listed for the last 6 months.

Date	Revised By	Changes
10/4/2011	Joan Anderson	(MOC# M20115346-001) - Updated entire procedure with details of Learning Forum process as specified in RRP 4.4-0001
06/30/2010	Pat Anthony	(MOC# M20102653-001) Revision to SAF 085 to align with new RRP 4.4-0001

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