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**OVERVIEW:** *This Safety information bulletin describes methods that have been successfully implemented to manage organisational change in a major oil and gas business. The methods include those applied to changes in teams and those involving individual changes of role. Note that this bulletin describes only one method: those intending to embark on a change process should consult other resources (see References and further information) and specialists in this field.*

## managing organisational change

Change is a continual process in most businesses and is usually driven by the need to maintain competitiveness and strategic advantage and also to improve performance against measures of safety, availability and cost. Change can be seen as an opportunity to make improvements across a range of areas, but it needs to be carefully managed to be successful – and safe.

### Regulator concerns

Organisations should discuss proposed changes with safety and environmental regulators. Typical concerns expressed by the regulators are that organisations should:

- Apply a consistent process in making changes
- Maintain adequate control of the process
- Subject their plans to external independent review
- Take due account of the impact of the change on the control of major hazards
- Continue to demonstrate safety, as set out in their COMAH safety report.

### Management of team changes

The following steps will help to ensure that changes in team size and structure are managed efficiently and safely:

- Define the new team structure
- Map tasks performed by the existing team onto the new team
- Identify changes in roles and accountabilities
- Account for tasks transferred elsewhere or no longer required
- Identify the key human factors risks\* (see Box 1)
- Review the impact of the change on the new team's capabilities/competence
- Review existing controls and identify new controls as required
- Envisage key SHE scenarios to ensure that the new team can cope
- Peer review key SHE issues by safety committee
- If risks are judged to be tolerable, manage the change
- Review changes after six to 12 months.

#### Box 1 Human factors risks

Team changes could downgrade the team's ability to:

- Maintain or improve plant integrity
- Maintain or improve plant availability
- Maintain or improve SHE related systems
- Manage essential knowledge and expertise
- Respond to abnormal situations

As a result of:

- Excessive workload
- Deficiencies in team working
- Lack of competence
- Lack of motivation
- Poor communications

### Management of individual changes

The following steps should help to ensure that the handover of roles from one person to another, or changes within an individual's role are managed efficiently and safely. The individual should:

- Define:
  - What they do
  - How they do it
  - Why they do it
- Understand the changes to their tasks/role
- Understand the attendant risks to:
  - Themselves
  - Others
  - The Business
- Mitigate the risks
- Plan and execute the change

### Supporting management of change

Establish a team comprising, for example:

a leader/facilitator, the leader of the new team, members of the existing team, discipline specialists and safety representatives. Their key tasks are to map the existing team structure onto the new structure and to identify and control SHE risks arising. Supporting forms and checklists provide a structure for managing changes, help maintain accurate and consistent records and demonstrate a thorough approach.

Examples of the stages in a change programme and the forms used are:

- Register change proposal form – record the nature of the change and likely risks
- Planning checklist – identify what will be affected by the change and thus what will need to be included in the change plan
- Conduct a 'task mapping' exercise or arrange for knowledge transfer – depending on nature of change and risks involved
- Change plan – assign specific change actions and completion dates
- Review planning checklist to ensure all knock-on effects have been considered
- Conduct close-out review – after six to 12 months; confirm that changes have been made.

The flowchart in Figure 1 illustrates the process.

# Management of change (MoC) process – Useful strategy and supporting documents

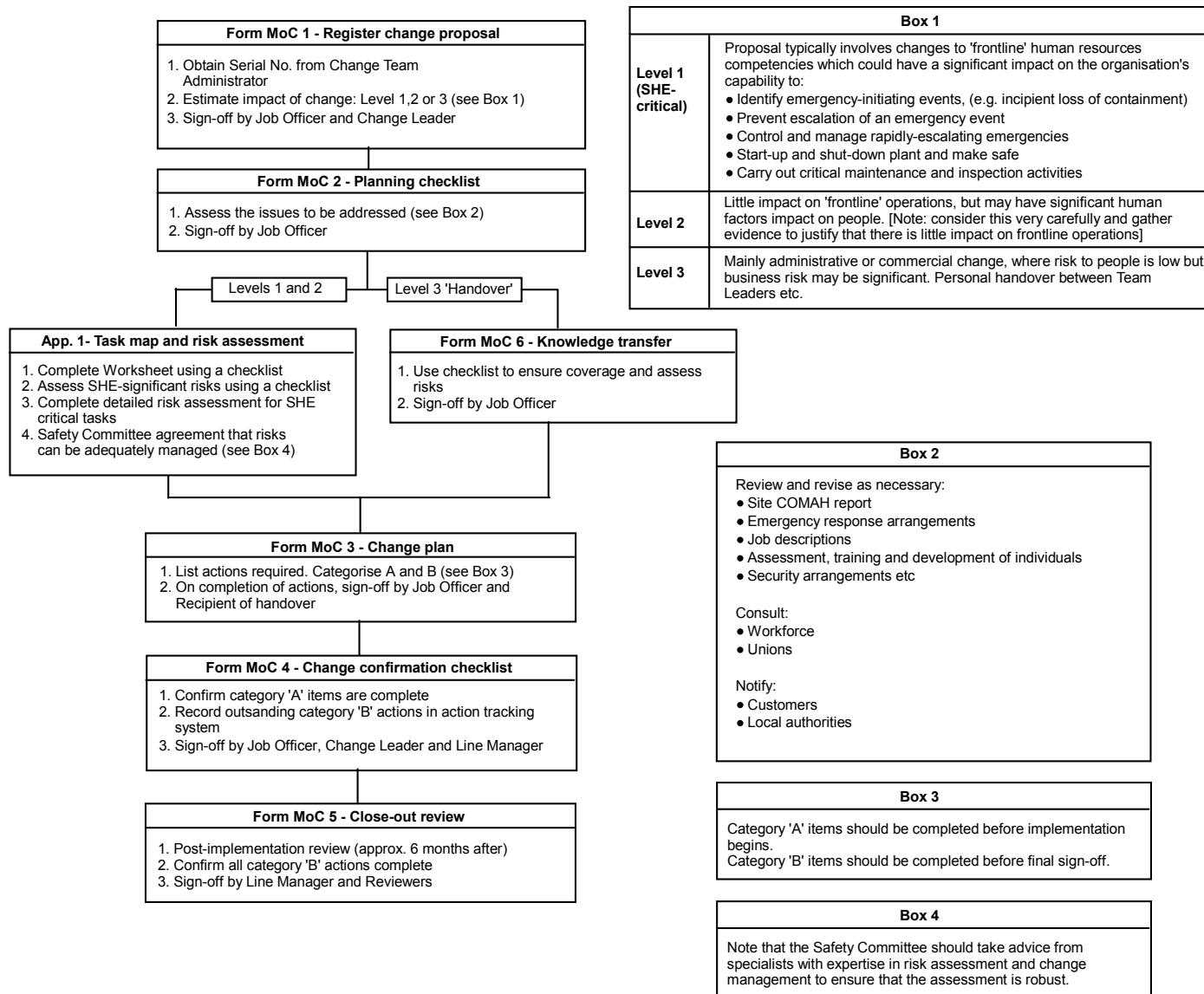


Figure 1 - Flowchart of process and resources for managing change

## References and further information

Clark, R., *Organisational transformation at a major petrochemical complex*, IP Seminar *Human factors – Transferring expertise to you!*, London, 10–11 December 2002 (unpublished).

IP *Human factors briefing notes resource pack*, No. 3 *Organisational Change*, Energy Institute, ISBN 0 85293 400 9. See Energy Institute website: <http://www.energyinst.org.uk/humanfactors/bn>.

HSE *Organisational change and major accident hazards*, Chemical Information Sheet No. 7 (CHIS7), HSE (2003). See HSE website: <http://www.hse.gov.uk/pubns/index.htm>.

Kotter, J.P. *Leading change*, Free Press, New York (1996).