

## PSM INTEGRATION TOOL: SELF-ASSESSMENT AND ACTION PLAN WORKSHEET

### Element: Management of Change

Management of change (MOC) aims to manage risks associated with changes to design, equipment, procedures, personnel, and the organization, and includes temporary and permanent changes.

For more information on the topic of Management of Change, review the CSA Z767 *Process safety management* standard.

For guidance on how to use this assessment, review “Managing risks in manufacturing workplaces: How to use the self-evaluation tool.” (WorkSafeBC, 2022)<sup>1</sup>

When choosing due dates as part of the action plans for improvement, it can be helpful for determining the priority to consider factors such as:

- The anticipated effort required to close the gap and make improvements,
- The benefits expected from taking action and implementing change, and
- The urgency (e.g., perceived risk) of the improvements needing to be made.

### Management of Change Self-Assessment

<p><b>1. Is a management of change (MOC) program in place?</b> <input type="checkbox"/> Yes (formalized) <input type="checkbox"/> Yes (informal) <input type="checkbox"/> No <input type="checkbox"/> Unsure</p>
<p><b>2. Does the MOC system manage risks associated with the following changes? Check all that apply:</b></p> <p><input type="checkbox"/> Design changes <input type="checkbox"/> Equipment changes <input type="checkbox"/> Procedural changes <input type="checkbox"/> Organizational changes <input type="checkbox"/> Not applicable</p>
<p><b>3. If an MOC system is present, does it consider the following aspects? Check all that apply.</b> <input type="checkbox"/> States what a change is.</p>

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<sup>1</sup> Customized guidance will be created by WPAC and BCFSC.

- States what type a given change is (emergency or temporary).
- States what replacement-in-kind (RIK) is (which is not included in MOC).
- Considers changes in operating procedures or safe operating limits.
- Considers changes in the structure of the organization and staffing.
- A process for reviewing and approving changes.
- Includes a risk assessment of the change.
- Includes the communication of the change with relevant stakeholders before the change is made.
- Includes any necessary training of relevant stakeholders before the change is made.
- Includes a procedure for implementing an emergency change, as well as communicating with relevant personnel in a timely manner
- States the documentation needed for a change including:
  - a.  Explanation of proposed change,
  - b.  Change authorization,
  - c.  Training requirements,
  - d.  Up-to-date drawings,
  - e.  Confirmation that change was implemented as design intended
- Not applicable.

**4. Does the MOC system manage temporary changes?**

- Yes (formalized process documented)    Yes (informal process)    No    Unsure
- Not applicable

**5. Does the MOC system use any of the following considerations to manage temporary changes? Check all that apply.**

- A time limit/timeframe is set
- A process for review and approval if the temporary change needs a time extension
- A process to return the equipment or system back to the original state when the temporary change has ended (e.g., removing any temporary installations).
- Not applicable

**6. If there have been instances of temporary changes being permanently implemented, are the following considerations made? Check all that apply.**

- Changes for other lifecycles (e.g., maintenance turnaround)
- Changes to documents and procedures
- Changes to supporting programs
- Not applicable

**7. Is the hierarchy of controls and inherently safer design (ISD) options considered during management of change?**

- Yes (formalized process documented)  
 Yes (informal process)  
 No  
 Sometimes  
 Unsure  
 Not applicable

**Management of Change Improvement Tools and Resources<sup>2</sup>**

Improvement Tool and Link
Example of Management of Change Plan <sup>3</sup>
<a href="#">SAFER (n.d.). Combustible Dust Management Assessment Handout</a>
<a href="#">Occupational Health and Safety Administration (OSHA) (2019a). MOC Guidelines</a>
<a href="#">CCPS (2021). Golden Rules for Combustible Dust</a>
<a href="#">PSM Egypt (2022). Management of Change Guideline</a>
<a href="#">CSCHE (2004). Managing the Health and Safety Impacts of Organizational Change</a>
<a href="#">NFPA 652 (2019). Standard on the Fundamentals of Combustible Dust</a>
<a href="#">NFPA 664 (2020). Standard for the Prevention of Fires and Explosions in Wood Processing and Woodworking Facilities</a>
<a href="#">Penn State (2016b). Process Safety Management: Management of Change Form</a>

**Action plan for Management of Change**

Question number	Plans and actions needed to address gap or improve existing approach	Action owner	Due date (yyyy-mm-dd):

<sup>2</sup> Customized resources for WPAC operations will be developed.

<sup>3</sup> Found in Appendix O of Report “Integrating Process Safety Management into Canadian Wood Pellet Facilities that Generate Combustible Wood Dust.”


Complete the following table after corrective actions have been implemented.

### Review of action plan for Management of Change

Improvement actions taken	
How did you ensure the controls were implemented in a timely fashion? How did you prioritize your actions?	
How will you ensure the implemented controls will continue to be effective over time?	
How are workers involved in developing and implementing controls?	
How do you know that workplace decisions related to safety are effective and sustainable?	
How do you measure change to establish a new performance expectation?	
When changes are made, how are interrelated procedures, programs, and policies updated effectively?	
Is a strategy for continuous improvement in place? How does this process work?	
If you have multiple locations, are lessons learned and continuous improvements shared with other locations? How does this process work?	
Is the safety management system self-sufficient, or does it rely on specific individuals to make it function? How do you ensure the system remains self-sufficient?	
Overall effectiveness of improvement actions	

## References

WorkSafeBC. (2022). *Managing Risks in Manufacturing Workplaces: How to Use the Self-Evaluation Tool*. Last accessed May 30, 2023 from <https://www.worksafebc.com/en/resources/health-safety/information-sheets/managing-risks-manufacturing-how-to-use-self-evaluation>

WorkSafeBC. (2023). *Enhancing Health & Safety Culture & Performance: Self-Evaluation Tool for Managing Risks in Manufacturing Workplaces*. Last accessed May 30, 2023 from <https://www.worksafebc.com/resources/health-safety/checklist/managing-risks-manufacturing-assessing-mobile-equipment?lang=en&direct>