

PSMd Meeting, 20 June 2018

Location: CSA Conference, Turner Valley Room, Westin Edmonton Hotel 9am-4pm

On-Webex: Morley Brownstein, Jean-Paul Lacoursière, Parnian, Marcello Olevierio, Suzanne Matthews, David Zimmerman (committee and structure), Andy Ridpath, Gilles Lau, Eric Clement, Melanie Wilson, Sèdoté Ghislain Hounkpe, Modusser Tufail

Present: Hua Deng, Sorin Dan, Francois Roche, Adrian Pierorazio, Tara Letian, Patti (copyright), Karyn Ferguson (membership and committees), Jyoti Patel, Lianne Lefsrud, Reid McPhail, Guy Broulliard, Graeme Norval

A1.2 CSA TC Update:

First meeting of CSA Z676 Tech Committee after standard has been published.

Worksafe BC has been working to introduce to process safety in industries where PSM has not previously been present, such as in the pellet training.

How do we move forward on improving awareness of CSA standards and create a structured approach to raising awareness of the standard, now that the standard has been out for a year?

How do we incorporate members of the PSM committee who are involved in promoting the CSA standard who are not on the formal CSA z767 technical committee. Do we onboard them as voting or non-voting members? Are there other ways to do this without violating copyright?

Copyright Discussion:

Using Z767 Content in Awareness and Training Presentations:

The PSMd would like to host informational workshops on the CSA standard and also training sessions, in a way that does not violate copyright. What are the restrictions in sharing CSA Z767 material in either scope? For example, during awareness presentations that have been conducted so far, some sections, ie. A table of the CSA Z767 elements copied from the standard, has been used.

CSA Response:

Reproducing material or referencing material are two different things. Referencing the standard means referencing a specific section. Someone would need to purchase the standard in order to view this information This encourages people to purchase the standard and brings revenue in. If too much of the standard is being quoted directly, CSA would likely want a royalty for licencing. When too much of the standard is copied directly in a workshop, people leave the workshop feeling that they are now informed on all of the details of the standard and they don't end up purchasing the standard. This could also become a safety issue if people take sections out of context, thinking that these small sections are all that they need to know for their application.

Ideally, CSA would like to see workshops simply reference the standard instead of directly quoting it. The standard can then be made available for purchase for the group.

Going forward, an umbrella licence could possibly be prepared by the task force of the technical committee for some material on CSA Z767 for use by technical committee members and whomever they provide permission to for purposes of awareness sessions.

Action: CSA and CIC agreement will be prepared by Graeme, Ian, Jyoti working with Tara on content that would be part of this umbrella licence for awareness presentation purposes.

PSMD Response:

If a comprehensive training were to be done, the standard should be included as part of the training. Right now, the PSMD is doing awareness sessions that are more of a high level overview, not copying large portions of pages of the standard, which should not be in violation of the copyright. These are organized by people who are external to CSA. The technical committee could have a task force would be responsible for more comprehensive training. This would be driven by technical committee members and would therefore be driven by a CSA internal group.

Use of Z767 by a company:

If a company has purchased the standard, can they prepare internal documents quoting the standard and conduct training for use within the company? Additionally, if someone prepares material that could feed into updates of the CSA Z767, can they use it freely once it becomes part of the standard?

CSA Response:

Yes, a letter can be provided by CSA to give royalty-free permission for use within the organization. Additionally, when material is being added to a standard that is someone's own intellectual property, an initial discussion needs to occur regarding joint copyright or licencing. Otherwise, if material is prepared by someone, on the technical committee, for the standard, it becomes copyright of CSA exclusively.

Action: Graeme and Jyoti will ask Tara to follow up with Marcello regarding the details of this letter.

CSA Member Onboarding Process:

- Privacy agreement
- Copyright assignment:
 - o When material is given to the technical committee, that material becomes copyright of CSA and depending on the relationship and need of the content, reciprocal arrangements can be created for content that an individual or organization prepared, so that the content can be used for training or internal use by the individual or organization.
 - o When content is shared with CSA for use in a standard, the person who shared the content is indemnified from any implications of the content that was contributed.
 - o Contributors need to verify that they can indeed share the material that they are sharing without violating copyright of someone else. If possible, CSA would rather reference other documents under other copyright than directly quote it. If it is directly quoted, then copyright permission should be sought.
- Member roles and responsibilities:
 - o How to work together as a team to reach consensus and complete training regarding the standard

Fair Use Fair Dealings Act and CSA Standard Usage:

In reference to Fair Use Fair Dealings Act, is it ok to use the standard in an educational, non-for-profit setting as part of curriculum or research?

CSA Answer:

There is a general less than 10% of quoting material, informal guideline from universities for uses such as these. This 10% rule does not apply for commercial use.

CSA Technical Committee Communication:

How do we as a Z767 technical committee, link to other committees for consistency of content without violating copyright?

CSA Response:

Chairs of committees can contact project manager who can contact the chair of other technical committees. Strategic steering committees need to be made aware of any issues that come up so that the steering committees can help work out the linkages between technical committees. The reference section of each standard can be used to aid in identifying standards that are linked and should be cross reviewed for content.

PSMD Meeting Content:

Approval of Last Minutes: Graeme, seconded by Adrian.

A1.4 Risk Assessment Activities:

Update from Marcello:

QRA Guideline [people risk]:

Purpose of the guidelines is to assess risk to people (workers and public) from release of hazardous materials/hazardous energy. It will support the CSA PSM standard Z767. Manny is leading the environmental risk guideline development which is also meant to support Z767 standard. These guidelines will explain how to complete the analysis that Z767 does not go into in detail.

Scope: Guideline is based on 2004 document. Risk analysis: Help risk analysts complete risk analysis in a consistent manner. The guideline does not go into detail on modelling techniques but points to the organizations that can be referenced.

Risk Tolerance Criteria: Retaining MIACC/PSMD for new facilities and using ALARP/HSE for existing facilities. Examples of land use planning will be provided as well to help with applying the guideline.

Status of Guideline:

Preliminary draft has been completed as of April 2018 and has been passed on for first review to A. Pierorazio, A. Ridpath and Z. Syed as co-developers and SMEs.

Planned Review Process:

1. SME review (both within Canada and internationally)
2. Regulatory Review
3. Broad Review
4. Publish in 2019.

Not all reviewers have been contacted as of yet. SMEs who have been contacted and who have agreed to review will be the only SMEs included.

Action: Melanie would like to be included as a reviewer.

Action: Marcello will reach out to Jean-Paul to see if he can assist with quality assurance of the document, specifically the technical content.

Action: Marcello will reach out to Parnian and Adrian for assistance with addressing comments and updating drafts. This review process is expected to be time consuming.

Discussion regarding navigating the CSChE editorial review process:

Copyright approvals still needs to be assessed and resolved for sections of the guideline that are including other organization's content. Provincial regulatory and federal reviewers still need to be identified and conformed.

Action: Graeme will work with Tara to follow up with Gerrard from Environment Canada on whether he is interested in staying on the technical committee for CSA z767 and being a reviewer for this QRA guidelines.

Motion: Jyoti and Graeme will interact with CIC to discuss and obtain publishing guidelines and then add to these as required for documents issued by PSMD. Proposed by Francois. Seconded by Marcello. No objections. This will assist with sorting out copyright approval process.

The QRA guideline should be reviewed by the CSA Z767 technical committee since it will be added as a related document. CRAIM has referenced 2004 revision and MIACC. CRAIM has issued a guideline on QRA which currently does not have a discrepancy with Marcello's guidelines.

Action: Francois will assist in Marcello obtaining a reviewer from CRAIM.

Operating Engineers Task Force [Ontario]:

-Revamping operating engineers regulation in Ontario.

Path 1 vs Path 2:

Path 1 provides a quick risk assessment process that identifies how operating engineers attendance is to be determined based on a risk score. There are some references to CSA Z767.

Path 2 involves a recommendation to adopt CSA Z767 for the operating engineers regulation scope. It allows flexibility in addressing PSM risks and also includes QRA. The QRA requirements align with CSChE QRA documents.

This would require change in a regulation of a TSSA act. TSSA would prepare a guideline document describing how the regulatory requirements could be met. Through a Risk and Safety Management Plan.

Action: Add to agenda for discussion for October meeting.

TSSA's timeline deadline for having regulation moved forward: July 1st, 2019.

A1.5 Z663 Land Use Planning for Pipelines Update:

The Z663 standard is currently in the ballot draft stage. They aim to publish in Oct-Nov 2018. It is a high level document focused on encouraging discussion between pipeline and land use planners in municipalities. It does not provide guidance on the details of how or what to do with regards to land use planning around pipelines. The PSMD and Z767 technical committee have concerns around the usefulness of this standard from a safety perspective.

-CSCHE comments have been submitted and reviewed by the technical committee

-We have to wait until October-November to see the final standard.

-review cycle is on a 5 year cycle for PSMD to make further comments

- Operating companies and regulators do not see the safety aspect of this standard. They believe that 662 covers any safety concerns.

-As the intention of the TC for Z663 is to have it accepted as a national standard of Canada, it should be possible to register an objection with the Standards Council of Canada.

-The CSA Z767 technical committee could submit a formal letter regarding concerns with the Z663 standard, which holds more weight than the PSMD sending a letter.

Action: Graeme and Jyoti will ask Tara to inquire internally at CSA to see what can be done internally regarding Z663 review and comments. Tara will need to get back to us on links to standards that are under development and under review so that we can get an early heads up on new standards that we may want to comment on.

Z260: Safety Metrics for Pipelines

Morley has identified that Z767 is not included in the list of references in Z260 since the new standard does refer to process safety management systems. He is asking whether there is a way to communicate between the Z767 and Z260 TCs so that they are made aware of the PSM standard and can include it in their references.

Graeme: As a group, the TC can prepare a response during the public comment period. Public Review comments close August 7, 2018. (publicreview.csa.ca)

Action: Morley will take the lead on taking a detailed look at Z260 and provide comments. Hua Deng and Adrian Pierorazio will assist. This will be funneled back to Graeme and Tara through the Z767 TC to submit comments to the Z260 TC.

Action: Graeme and Jyoti will ask Tara to get back to us on links to standards that are under development and under review so that we can get an early heads up on new standards that we may want to comment on.

Iris Monner is the PM for the Z260 TC.

SCC.ca/en/standards/notices-of-intent

B149.2:

Action: Graeme and Tara will follow up with on Jean-Paul B149.2 status.

A1.6: Project Overview on Environmental Risk Assessment Guideline

Status Update from Manny:

-Draft Guideline Sections team reviews complete and in progress – 12/22

-Plan to be prepared to calibrate environmental risk criteria

-After team reviews are completed for the draft guideline, a readable draft will be prepared for peer review

-Manny has attached links in his presentation to the always latest team reviewed/updated Orientation Document (ie. Draft guideline), Environmental Risk Decision Methods Document and Excel Aid for Environmental Harm Index Method. Link also to the always latest team reviewed/updated Key Terms and Acronyms Document.

A1.7 CSA Z767 Awareness Marketing and Networking Development

FYI: Chris Muldoon is no longer working at CIC so do not send him emails at his work email.

Jyoti is presenting slides that Chris has provided:

Marketing Initiatives:

-CIAC – SHARE & PSM

1. CSA Z767 Awareness Presentation

Guy has completed a 30 minute presentation on CSA Z767. Francois Roche was present as well. The presentation was well received and started some good discussions.

There was also a May 30-31st presentation by Assistant Manager PSM with GCM to Laurentide Controls customers. There were 15-20 people in the audience. They are interested in promoting PSM since that blends nicely with their business of selling SIS systems.

Guy does not have any future talks lined up.

2. RMS presentations: Understanding Benchmark Practices for PSM course.

Clients have questions about different PSM standards and how they differ/overlap. Audience members come with their own copies of the standards or are provided with a copy. 36 different companies have attended presentations so far. The next session is in September in Calgary and is expected to be the last. There may be another presentation in 2019.

Action: Guy and Jyoti will maintain a list of contacts who have and exposure to a Z767 awareness workshop or presentation. CIC/CSChE Contact will need to be identified to replace Chris. If anyone is

going to be doing a presentation until a formal marketing team has been assembled, please keep Jyoti and Guy in the loop.

3. Online Workshop for CSChE PSMD members for Fall 2018 (30 minute webinar):

Chris was taking the lead on this initiative but the status is currently unknown. Z767 awareness presentation material that currently exists can be adapted for this presentation.

Parnian is putting together a 30 minute e-learning module on an introduction to Process Safety Management at Enbridge. Enbridge may be able to offer the module for use by the CSChE as an e-module product. Graeme has an e-learning module (20-30 minutes) that has been prepared for Energy Safety Canada in Articulate Storyline providing a generic introduction to PSM referencing the Z767 standard that will be released in 4-6 weeks. The PSMD could put together a team to create a second tier presentation that goes into more detail, carrying in some details from the 2 hour presentation that has been completed for Z767.

Action: Marcello to keep Jyoti and Guy in the loop of the Enbridge module development to enable the PSMD to work collaboratively with any groups that are putting together content.

Action: Parnian, Jyoti, Graeme, Adrian, Guy, Marcello, Amanda and Hua have volunteered to discuss, offline, the pros and cons of a live vs. recorded presentation for the PSMD with a goal of creating a path forward for a webinar for the PSMD for Fall 2018.

4. Strathcona County, Fire Department Consulting Engineer:

Modusser is promoting PSM and also considering introducing the CSA Z767 standard to HSE managers, Emergency Responders and Fire Inspectors. Considering the best ways to engage with large and smaller plants in Strathcona county.

Action: Jyoti will send Modusser the exemplar that U of T students created for small business adoption of the CSA Z767 standard.

Action: Modusser will provide some information to Morley on the approach that Strathcona County is taking in adopting PSM and land use planning that PSMD can use as an example of real world application.

Website updates:

Chris was working on this but has now left CIC. A PSMD logo has been created but Jyoti has not seen it yet.

Networking:

Action: Guy, Francois and Jyoti will develop a list of other Technical Committees that we want to be aware of and collaborating with. A possible goal is to have these interrelated committees to meet and discuss at the next CSA conference.

A1.8 PSLM CSChE Conference 2018 Planning Update:

Student Workshop Update:

Revision of workshop is under way converting it from lecture style to a more interactive workshop style. 2 hour presentation. Monday 2-4 pm time slot scheduled at the CSChE Conference. Monday time slot selected to allow for better networking between students and PSMD members as well as allowing for Parnian and Amanda to promote workshop on Sunday. This workshop is targeting undergraduate students.

Kenny Wai (CSA) is hosting a workshop at CSChE conference targeting the graduate students.

Parnian, Amanda and Kenny are in discussions so that undergrad and grad students can attend the PSM workshop as well as the CSA workshop.

Registration for PSMD workshop will also be set up in order to improve attendance and help presenters prepare for the expected attendance.

Combined CCPS Meeting with PSMD meeting:

We are short on papers. We have 14 papers so far. We need double this amount. Presentations should be either 20 minutes or 40 minutes, not 30 minutes.

The theme of the PSM Sessions will be "Elements of PSM".

We would like to get an international flavour of PSM in different countries.

Action: Adrian will reach out to CCPS and CIAC to see if there are additional papers that anyone wants to submit. Lessons learned presentations are always of interest as well.

Action: Gilles will provide a possible contact for a Loss of Primary Containment presentation, and CIAC PRIM metrics and site self assessments could be a possible topic that Gilles could present on.

Action: Jyoti will send out a call to papers email to PSMD.

CCPS and PSMD collaborative meeting will be on Wednesday October 31st:

- PSMD AGM may occur on the 30th of October.
- CCPS Oct 31/Nov 1 meeting dates:
 - o Wednesday afternoon CCPS and PSMD can meet together. CIAC can join Wednesday afternoon for those who are available. CSA is welcome to attend as well. Meant to be a collaborative meeting, agenda needs to be developed Meant to highlight activities occurring across the different committees.
 - o Thursday CIAC Process Safety Network and PSMD groups will meet individually for their groups' meetings.
- **Action:** Adrian will book a room for the Wednesday afternoon meeting.
- **Action:** Graeme will book rooms for Nov. 1st meetings at U of T for the PSMD and for the Process Safety Network.

A1.9 Other Business:

- Motion to approve Feb 2018 minutes by Jyoti. Seconded by Guy.
- IChemE journal including PSMD content updates: no update.
- 2017 MIARC English Translation:

- Liability issue between CRAIM, MIARC and PSMD regarding intellectual property. Reviewers were asked to acknowledge the intellectual property sensitivity as the MIARC document was reviewed. MIARC translation will be sent for printing for the end of June. September 2018 is when the book is expected to be available.
- OAQ is putting together a guideline for Process Engineer Qualifications. This will be discussed further at the next meeting.

Meeting Adjourned: 3:42 pm