

Major Shutdown Management

Opportunity Self-Assessment

	Innocence		Excellence
1	Major S/D work is planned and managed as routine maintenance with no additional allocated resources.	1 2 3 4 5	Exec. sponsors, project governance & S/D PM and systems ID and agreed 6/12/18 months ahead of S/D.
2	No formal S/D project management methodology used.	1 2 3 4 5	S/D charter, goals & objectives established and integrated into operating plan.
3	Compliance to established project key milestones is poor with minimal consequence.	1 2 3 4 5	Key schedule milestones agreed, preliminary budget guidelines identified.
4	Lessons learned from previous S/D's not captured or reviewed resulting in preventable issues and delays.	1 2 3 4 5	S/D project team established, lessons learned reviewed, work list criteria confirmed and planning begins.
5	S/D planning and scheduling completed in isolation from the larger organization.	1 2 3 4 5	S/D key processes and key event schedule (dates) developed, reviewed, agreed with key stakeholders.
6	S/D team mobilized late with inadequate resources to optimize planned S/D resources.	1 2 3 4 5	S/D team, systems, office mobilized. Lessons learned reporting started. Strategic contractors engaged.
7	No formal method used to ID asset condition and S/D work resulting in "missed" work opportunities.	1 2 3 4 5	Standing planning meetings begin to identifying all proposed S/D work from stakeholders.
8	Capital planning process out of synchronization with the physical condition of the plant.	1 2 3 4 5	Capital projects funding approved, master schedule developed, long-lead time/specialty eqpt. procured.
9	Required Eng. work delayed due to work not be ID or budgets approved resulting in schedule slippage.	1 2 3 4 5	Asset owners approve prioritize projects for scope and budget. Required engineering work ID and started.
10	Inadequate S/D team resources mobilized late and result in scrambling to catch-up on original schedule.	1 2 3 4 5	S/D Team mobilized as per schedule with execution plan finalized and communicated.
11	Approved projects and scopes of work in flux as final S/D list of approved work not completed as per schedule.	1 2 3 4 5	S/D work list closed, work pkg. bid strategy developed, Eng. complete with BOM and sent to procurement.
12	No overall integrated master schedule developed to ID potential scheduling conflicts (e.g. cranes, space).	1 2 3 4 5	S/D master schedule with all projects and all predecessor and successor projects identified.
13	Routine mtce. lock-out procedures used for SD proves inadequate to maintain safe work environment.	1 2 3 4 5	Lock out and work procedures developed, reviewed and signed off with contractors for operating projects.
14	Lack of communication and coordination with prime contractors results in unclear roles & responsibilities.	1 2 3 4 5	Successful bidders, ID, baseline schedule established and procurement/construction contracts awarded.
15	Routine mtce and operating procedures fail to scale to meet additional work load and manpower.	1 2 3 4 5	Additional manpower reqts. ID & secured. Preliminary inspection, quality, safety and site plans established.
16	Site logistics for lay down areas, contractor trailers, crew movement and security not fully thought out.	1 2 3 4 5	Equipment and consumables procured, inspected and on site. Base line schedule frozen.
17	Contractors fail to provide pre-site safety / orientation training to crews resulting in confusion at site.	1 2 3 4 5	Site plans and eqpt. pre-inspections completed. Contractors mobilized for training and hazard reviews.
18	Equipment released to S/D team late and in poor order (loaded, uncleaned or positioned).	1 2 3 4 5	Production plan ramp down, position, drain, cool down, isolate, test and hand over to S/D Team
19	Poor attendance by contractors to shift/daily status meetings results in unclear progress reporting.	1 2 3 4 5	Execute work - clean, open, inspect, report, execute work plan, ID variances & take corrective action to plan
20	S/D team routinely fails to provide "keys" to operations as per agreed schedule.	1 2 3 4 5	Re-commission, ramp-up and handover to ops. Analyze lessons learned and report-out. Demob S/D Team.

Scoring Methodology: Add-up the total score of your self-assessment (circled scores).

- If you scored; 20 - 40 - Substantial opportunity for improvement
- If you scored; 41 - 60 - Significant opportunity for improvement
- If you scored; 61 - 80 - Multiple areas of opportunity for improvement
- If you scored; 81 - 100 - Congratulations. You are an effectively managing your planned shutdowns.