



## CITGO

### CITGO Drives Management of Change Innovation for State-of-the-Art Safety and Environment Processes

From the gasoline that fuels your family car to the advanced medical equipment at your community hospital, CITGO provides petroleum based products that improve our daily quality of life. Based in Houston, Texas, CITGO is a multi-faceted refiner and marketer of transportation fuels, lubricants, petrochemicals and other petroleum-based products. An integral part of the company's mission is its dedication to the safety and health of more than 3,500 CITGO employees and the protection of the environment across its operations.

CITGO takes great pride in the well-deserved recognition that its safety and environmental programs have earned, yet the company remains committed to continuous improvement in these areas – always looking for tools that will further strengthen its work processes and enhance performance. That is why CITGO has been using *Sphera IMPACT ERM®* software since 2003 to reduce worker health and safety risks while also improving efficiency and productivity.

“We have a long history with Sphera IMPACT ERM,” says Dawn Weinand, Senior Safety Advisor in the Corporate Health Safety Security and Environment (HSSE) department at CITGO. “For my role in the organization as a data collector, IMPACT ERM makes my job so much easier!”

CITGO operations are subject to numerous local, state and federal environmental and safety regulations from agencies like the Occupational Safety and Health Administration (OSHA), and the Environmental Protection Agency (EPA). CITGO continually analyzes, maintains, and improves its business processes to address compliance issues across the corporation.

CITGO relies on IMPACT to monitor incidents and near misses throughout the organization. The company's business units also use the system to document action items from many different activities, including external and internal audits. Sphera IMPACT allows the organization to store safety and environmental information in one easily accessible database. But CITGO's most recent project has been the design of an innovative Management of Change process powered by the IMPACT.

In 2010, Weinand and CITGO began working with Sphera to configure the system to meet the company's specific needs. Weinand has been working with a team of individuals across the organization to produce a common business

#### Challenge

- Ensure continued accurate compliance with OSHA and EPA regulations
- Increase efficiency of safety and environmental processes
- Identify potential performance gaps and areas for improvement
- Eliminate manual paper-based and spreadsheet reporting

#### Solution

Operational Risk Solution™:

- Management of Change

#### Results

- Create centralized HSSE database for enterprise performance tracking/analysis and customize for Management of Change process
- Reduce multiple HSSE business processes into one for efficiency and consistency
- Save time/money with automatic reports and eliminate the need for paper reporting
- Save time tracking actions to completion for accountability and lessons learned

## CITGO Goes Ahead with Management of Change Tool

process that can be utilized by all business units to streamline the Management of Change process. The high degree of collaboration within the team is a key to their success.

In their quest for an improved Management of Change tool, Weinand and her team devised one business process to reduce the multiple processes that are currently in use. The team presented their ideas to the company's senior management, vice presidents and general managers and received approval to move forward with their plans. They have now begun working with Sphera to configure IMPACT to automate the Management of Change process.

CITGO's customized system will facilitate the use of best practices, standardize terminology and generate new, improved performance metrics across the enterprise.

"Automation is a critical step in helping CITGO move forward with an improved Management of Change process," Weinand says. "Compliance is important, of course, but that's a given. Our bigger goal here is efficiency and consistency. IMPACT helps us achieve compliance, efficiency and consistency through automation with one tool."

By design, the automated Management of Change process will reduce paperwork. Less time will be spent updating and scanning documents. Having the ability to track all action items from a single electronic database will also drive efficiency.

"We're trying to eliminate human error by creating certain rule sets within the tool," Weinand says. "Through the configuration of *IMPACT ERM*, we can make it easier for the end users to take the right path."

For accountability purposes, CITGO's system will incorporate Sphera IMPACT's automatic alerts. These alerts are already in use within the action item workflow.

"You don't have to keep telling people they have action items that are due - that alert is already built in - so there's one example of where the efficiency comes in," Weinand says. "It's from the tool sending out emails, letting the accountable parties know that 'Hey, you have an action item'."

Each quarter, Weinand performs statistical analysis on OSHA recordable injuries. Data pulled from IMPACT includes type of injury, accident agency, equipment involved and root cause. Leadership can recognize performance gaps, improve stewardship and minimize corporate liability.

"With Sphera, we can be more proactive, taking preventative actions before accidents happen," Weinand added. "Through near miss reporting more learning is happening. People have access to the

lessons learned. The more we put into the system, the more we can mine out. That's the real value."

Weinand and her colleagues continue to work with end users who enter data into the IMPACT system so that more robust HSSE analyses can be conducted. These types of analyses are pivotal in helping CITGO maintain its excellent safety and environmental performance.

"There are lots of things that you can do with the Sphera system, especially the Assessment module," Weinand says. "The biggest value is getting all of your data into one system. When you train your users properly, there's a gold mine of information you can get out of the system!"

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Dawn Weinand  
Senior Safety Advisor  
CITGO