



Specially
Developed
for Process
Industries

SHUTDOWNS SUPERCONFERENCE 2003

Best Practices in Preplanning and Cost Allocation

December 8 and 9, 2003

**Optional Post-Conference Workshops — December 10, 2003
Hyatt Regency, 700 Centre Street S., Calgary, Alberta**

Find out what works from leaders in shutdown management. They'll give you their advice on critical issues, including:

- Planning strategies that drive optimal shutdown results across industries
- The latest information on CMMS packages available for planning, scheduling and cost control
- The cost management philosophy: analyzing the cost impact of every decision during your shutdown
- Successful cost allocation and progress tracking during your shutdown
- The information needs of contractors to ensure a successful turnaround
- Making safety a top priority during your shutdown: learning from experiences of leading safety experts

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Weyerhaeuser	DuPont Canada	JMC Consulting Ltd.	Quinn Contracting Ltd.
Emerald Associates Inc.	Key Safety Inc.	Calpine Canada	
Agrium Inc.	Jacobs Catalytic Ltd.	Quinn Contracting Ltd.	McCaughey Technological Services Ltd.
Alberta-Pacific Forest Industries Inc.	Independent Project Analysis Inc.	Gowling Lafleur Henderson LLP	Suncor Energy Inc.
Syncrude Canada Ltd.	BP Canada Energy Company	The Turnaround Management Company	Lister Management Inc.
Denco Planning Services Inc.			

**Register Now: 1-877-927-7936 or 416-927-7936
www.CanadianInstitute.com**



IS THE PROSPECT OF YOUR NEXT SHUTDOWN KEEPING YOU AWAKE AT NIGHT?

Scheduled plant shutdowns are a massive undertaking, requiring highly complex planning and scheduling to minimize downtime and pull off the project without a hitch. When one minor setback can easily escalate — wasting precious time and resources — you can never be too prepared. Across different plants and industries, the key to a successful shutdown remains the same: *plan, plan, plan.*

The Canadian Institute's Shutdowns Superconference 2003 brings together process industry leaders to share their experiences and lessons learned in shutdown management. With a special focus on shutdown preplanning and cost allocation, they'll cover critical issues, including:

- Plant preplanning: how to ensure you are prepared for any eventuality during your shutdown
- CMMS systems: an overview of software packages available for turnaround management success
- Effective data collection and cost allocation techniques to keep shutdown costs in check

- The contractor perspective: the information essential for a contractor going into a shutdown
- Shutdown safety: how to avoid accidents before they occur
- The Human Factor: managing an effective shutdown workforce
- Planning and scheduling a successful turnaround at **Suncor Energy Inc.**
- Plus! Shutdown planning strategies for optimum shutdown performance from a cross-section of process industry leaders including: **Syncrude Canada Ltd., Calpine Canada** and **DuPont Canada**

Your plant shutdown is the most expensive maintenance project of the year, so ensure that you have the information you need to successfully execute, and save money on your next one. Join your colleagues and competitors on December 8 and 9 for this important process industry event. Register today by calling **1-877-927-7936** (or **416-927-7936**) or online at www.CanadianInstitute.com.

HEAR FROM THESE INDUSTRY LEADERS AND EXPERTS:

CHAIR

John McLay
President, JMC Consulting Ltd.

SPEAKERS

Derek Parkes

Plant Integrity Leader
Syncrude Canada Ltd.

Gary Olivi

Maintenance Team Leader
Calgary Energy Centre, Calpine Canada

Martha E. Forkes

Senior Planning & Scheduling Specialist
Engineering Department
DuPont Canada

Dean P. Findley

Regional Director, North America
Independent Project Analysis Inc.

Allan Winters

Turnaround Coordinator,
West Pembina Plant,
BP Canada Energy Company

Martha McCauley

CEO, Programming Consultant
McCauley Technological Services Ltd.

Harry Chappell

Chief Planner, Turnarounds
Suncor Energy Inc.

Ian Nicholson

Implementation Specialist
Emerald Associates Inc.

Jim Perry

Director
Hewden Services
(Glasgow, Scotland)

David Phillips

Implementation Specialist
Emerald Associates Inc.

Allen Pieper

Asset Reliability Manager
Agrium Inc.

David Frinsco

Operations Manager
The Turnaround Management Company

W.J. (Bill) Atchison

President & CEO
Quinn Contracting Ltd.

Niels Frederiksen

Vice President, Operations
Jacobs Catalytic Ltd.

Terry Timothy

Manager,
Environmental/Hazmat Services
Key Safety Inc.

Rick Petersen

Senior Safety Advisor
BP Canada Energy Company

Kim Nutz

Gowling Lafleur Henderson LLP

Al Ward

Mill Manager
Alberta-Pacific Forest Industries Inc.

Lyman Rorem

Maintenance Business Leader,
Grande Prairie Pulp Mill
Weyerhaeuser

Dennis Comeau

Director, Shutdown/Turnaround
and Maintenance Services Division
Denco Planning Services Inc.

Pierre Campagna

Director, Maintenance
Improvement and Training Division
Denco Planning Services Inc.



SHUTDOWNS SUPERCONFERENCE 2003

December 8 and 9, 2003

Monday, December 8, 2003

8:00 Registration Opens
and Coffee Served ☕

9:00 Opening Remarks from the Chair

John McLay
President
JMC Consulting Ltd.

9:15 Best Practices in Shutdown Planning:
A Process Industry Cross-Section

Panel:

Derek Parkes
Plant Integrity Leader
Syncrude Canada Ltd.

Gary Olivi
Maintenance Team Leader
Calgary Energy Centre
Calpine Canada

Martha E. Forkes
Senior Planning & Scheduling Specialist,
Engineering Department
DuPont Canada

Dean P. Findley
Regional Director, North America
Independent Project Analysis Inc.

- An overview of best practices in shutdown planning across process industries
- What planning strategies drive performance and impact the bottom-line?
 - proven planning techniques to improve results
- Creating a detailed plan: effective work definition and work prioritization
- To what degree is the development of the work list important to the overall success of the shutdown?
- When should planning start for maximum benefit?
- What is the key to a smoothly run shutdown?

10:45 Networking Coffee Break ☕

11:00 Shutdown Preplanning:
Is Your Plant Ready?

Panel:

John McLay
President
JMC Consulting Ltd.

Allan Winters
Turnaround Coordinator
West Pembina Plant
BP Canada Energy Company

Martha McCauley
CEO, Programming Consultant
McCauley Technological Services Ltd.

During your shutdown, you can't afford to lose any time due to unforeseen events. Ensuring that you are prepared to handle the unexpected eventualities of a shutdown requires an extraordinary amount of planning. In this key session, get practical advice on shutdown pre-planning, that will prove priceless for your next turnaround.

- A review of the pre-planning issues above and beyond "the scope of work"
- How does the effective preparation of pre-planning factors impact a successful shutdown?
- How to prepare your plant for the shutdown work
- How to make the pre-shutdown period work for cost control, contractor learning curve and shutdown coordination
- Is operations pre-planning as valuable as the work scope pre-planning?
- Effectively sourcing materials necessary for the shutdown: getting what you need, when you need it
- Best practices in planning for effective cost tracking

12:15 Planning and Scheduling Suncor's 2003
Turnaround: Leading Edge Techniques
to Manage a Successful Shutdown

Case
Study

Harry Chappell
Chief Planner, Turnarounds
Suncor Energy Inc.

Ian Nicholson
Implementation Specialist
Emerald Associates Inc.

In summer 2003 Suncor entered upon their largest turnaround ever, which included over 30,000 tasks, with the confidence that comes from a solid planning and scheduling infrastructure in a very high stakes game. This presentation will be the story of how it all came together to create a stunningly successful turnaround.

- Leading edge planning and scheduling techniques implemented to effectively manage the shutdown and add value to the project
- To what degree was designing an integrated scheduling package critical in achieving results?
- How did enterprise project planning help to create a seamless flow of tasks during the turnaround?
- How was the communication gap bridged among shutdown team members for a more productive shutdown?

SHUTDOWNS SUPERCONFERENCE 2003

December 8 and 9, 2003

1:15 **Networking Luncheon
for Speakers and Delegates** 

Luncheon Sponsored by:



Luncheon Address:

*The Managed Service Approach:
From Europe to North America*

Jim Perry

Director, Hewden Services (Glasgow, Scotland)

The European rental equipment industry has evolved from traditional "take and pay" rental houses to a "Managed Service" approach. Driven by the petrochemical industry, this approach is moving to North America as industry struggles with productivity, asset performance and safety standards. How did this approach evolve? What are the implications and outcomes for large plant sites? And how will this approach change the rental industry relationship with large plants, shutdowns and construction projects in Canada?

2:30 **CMMS Packages for Planning,
Scheduling and Cost Control**

David Phillips
Implementation Specialist
Emerald Associates Inc.

- What are the characteristics of software programs available for turnaround planning?
 - the critical elements of shutdown management reporting programs
 - the pros and cons of the various systems
- What CMMS systems are being used for turnarounds and how successful have they been?
- How can the hurdles of integrating CMMS project software be overcome for more effective planning and control?
- Integrated scheduling: a streamlined and coordinated approach to running your next turnaround
- How to match the level of planning and scheduling to the size of the risk
- The key to reporting against the plan and 'earned value'
- How to utilize the full potential and power of daily reporting

3:15 **Networking Refreshment Break**

3:30 **The Cost Management Philosophy:
The Key to a Successful Shutdown**

Allen Pieper
Asset Reliability Manager
Agrium Inc.

- Implementing cost management as a philosophy in the full turnaround cycle
- How to consider the cost impact of every decision during a turnaround
- Cost estimation: budgeting for the turnaround and creating a control estimate to effectively manage costs
- Cost control: improving upon and reducing costs by:
 - managing work scope changes
 - correcting variances
 - improving productivity
 - managing performance and risk
 - eliminating waste
- Cost accounting: cost tracking, variance analysis and comparison against the control estimate
- Cost forecasting: using forecasting techniques to predict the final turnaround cost at any point in time
- Cost stewardship: reporting budgeted, actual, remaining and predicted final costs to senior management on a regular basis

4:15 **Data Collection Tools and Techniques:
Cost Allocation and Progress
Tracking During Your Shutdown**

David Frinsco
Operations Manager
The Turnaround Management Company

- Effective data collection strategies: how to gather valuable information to keep on track and on target during your shutdown
- How to create a time efficient method of keeping track of scheduled work and costs
- What are the available tools for controlling costs and preventing overruns?
- Checks and balances: documentation techniques to ensure billing accuracy from contractors
- How to remain on track and plan your next budget by ensuring the timely receipt of contractor invoices

5:00 **Chair's Recap and
Conference Adjourns to Day Two**

**Networking Social Event
Sponsored by:**





SHUTDOWNS SUPERCONFERENCE 2003

December 8 and 9, 2003

Tuesday December 9, 2003

8:00 Coffee Served ☕

9:00 Opening Remarks from the Chair

9:15 **Turnaround Contractor Perspective: What Do Contractors Need for Optimal Performance?**

W.J. (Bill) Atchison
President & CEO
Quinn Contracting Ltd.

Niels Frederiksen
Vice President, Operations
Jacobs Catalytic Ltd.

Ensuring that the job is completed on time and within budget is the promise of a turnaround contractor. But, reaching this goal is no small task. In this important session, get key insights into the contractor's perspective of a shutdown, and find out what you can do to make the contractor's job easier, so that both parties can work together to achieve the common objective of an efficiently executed shutdown.

- What information is essential for a contractor going into a shutdown?
- What are the typical challenges faced by contractors in a shutdown?
- To what degree is information sharing between parties involved important for the execution of a successful shutdown?
- How are contractors managing the shortage of skilled labour?
- Data gathering and billing accuracy: what are the challenges faced by contractors to ensure the integrity of information collected during the turnaround?

10:15 Networking Coffee Break ☕

10:30 **Safety First: Critical Information for a Safe Shutdown**

Panel:

Terry Timothy
Manager, Environmental/Hazmat Services
Key Safety Inc.

Rick Petersen
Senior Safety Advisor
BP Canada Energy Company

- How to ensure that safety is a top priority with your shutdown team

- effective corporate policies and procedures to promote top down commitment to safety
- Health and safety training initiatives: ensuring all personnel are following procedures and regulations to avoid injuries and fatalities
- An overview of a pre-shutdown hazard analysis: how to avoid accidents before they occur
 - confined space entry
 - working from heights
 - testing procedures
 - personal protection equipment
- To what degree can a safety or rescue contingency plan count in a hazardous situation?
- Ensuring worker safety: personal risk management and hazard assessment

11:45 **Navigating the Legal and Regulatory Framework for OH&S During Your Shutdown**

Kim Nutz
Gowling Lafleur Henderson LLP

- What are your legal responsibilities when it comes to managing the safety of your shutdown team?
- How can you ensure that you have met your responsibilities as the prime contractor?
- Are you exercising due diligence?
- An update on the *Occupational Health & Safety Act*: what you need to know to avoid prosecution
- OH&S responsibilities of managers, supervisors and employees

12:30 **Networking Luncheon for Speakers and Delegates** 

1:45 **The Biggest Variable: Strategies for Effective Shutdown Personnel Management**

Al Ward
Mill Manager
Alberta-Pacific Forest Industries Inc.

- What are the challenges to successfully managing a temporary shutdown workforce?
 - how can you keep the team motivated?
- Managing your shutdown team for optimal performance
 - coordinating different contractor teams
 - delegating responsibility and making sure the job gets done
- Hiring strategies: attracting, hiring and retaining skilled labour for your shutdown
 - length of shifts
 - working conditions
- Effective communication strategies: justification for getting the resources you need to run your shutdown smoothly



SHUTDOWNS SUPERCONFERENCE 2003

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2:30

The Postmortem: Overcoming Challenges and Exploiting Opportunities for Future Shutdown Success

Lyman Rorem
Maintenance Business Leader
Grande Prairie Pulp Mill, Weyerhaeuser

Upon completion of a shutdown, the work is far from over. The key to ensuring that your next turnaround is planned and executed more effectively than the last is to conduct an in-depth investigation into what worked and what didn't. In this important session, get critical insights into the value of the postmortem.

- What are key elements of an effective postmortem?
- Next year's shutdown: what to consider through this year's planning process
- How to ensure that the critique process is used as a key improvement tool
 - what information is critical to include in this process?
- Inspection processes: what are the key tools for future shutdowns?
- The shutdown: developing a year long process, rather than an annual event
- How to use an ongoing master shutdown plan

3:15

Networking Refreshment Break

3:30

Optimizing Shutdown Success: Effectively Developing and Implementing Shutdown/Turnaround Procedures

Dennis Comeau
Director, Shutdown/Turnaround and Maintenance Services Division
Denco Planning Services Inc.

Pierre Campagna
Director, Maintenance Improvement and Training Division
Denco Planning Services Inc.

- What are the benefits of a structured shutdown process?
- An overview of the different uses of procedures for turnarounds
- How to set-up project software to improve shutdown performance
- To what degree is involvement from all departments essential for continuous improvement?
- How to avoid situations during your shutdown that jeopardize the effectiveness of the job

4:15

Closing Remarks and Conference Concludes

WHO SHOULD ATTEND

- Shutdown Managers
- Turnaround Managers
- Maintenance Managers
- Plant Managers
- Operations Managers
- Maintenance Engineers
- Materials Mangers
- Facility Managers
- Asset Management Specialists
- OH&S Managers
- Project Managers
- Reliability Engineers

From process operations, including: oil refineries, gas processing plants, pulp & paper mills, steel mills, breweries, petrochemical plants, power generators and more.

Here's what delegates have said of last year's Shutdown/Turnaround Management conference:

"Good Networking and Information"

Terry Krewusik, Turnaround Coordinator, Dow Chemical

"Excellent conference. Well organized and very informative"

*Doug Wakaruk, Shutdown Coordinator
Pengrowth Corporation*

"Great variety of speakers and ideas"

Allan Works, Plant Superintendent, KeySpan Energy Co.

"Well planned and executed conference — high quality of information"

*Richard Gault, Turnaround Coordinator
EnCana Corporation*

"Real life turnaround sharing"

Bruce Parry, Turnaround Coordinator, ConocoPhillips

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A Step by Step Guide to Turnaround Data Collection and Cost Tracking: A Case Study Illustration

Workshop Leader:

Martha McCauley, CEO, Programming Consultant, MTS (McCauley Technological Services Ltd.)

One of the greatest challenges encountered during a plant shutdown is effectively tracking costs to ensure that the shutdown remains on target. Gathering data for cost allocation purposes requires a great deal of coordination among departments and employees in order to develop a system that works. In this hands-on, interactive workshop, Martha McCauley will take you through the cost tracking processes developed for the BP West Pembina 2003 turnaround and will share practical examples of the database used, the cost tracking spreadsheets employed and how the cost tracking flow should work.

Specific topics to be covered include:

- Creating employee buy-in for the system
- Shift meetings to stay on track
- The system for work permits
- Scheduling, work progression and Gant charts
- Working with contractors, engineering and operations for effective cost tracking
- Problems encountered and how they were overcome
- Implementing improvements for the 2006 turnaround

Attend this unique 'how to' workshop and take the opportunity to gather practical information that will help you to develop an effective data collection and cost tracking system for your next turnaround. Space will be limited to allow maximum benefit for participants. Register today to secure your seat.

Martha McCauley has worked in the oil and gas industry for over 20 years, with a background in Production Accounting, Auditing, Maintenance Management and Planning, and IT. She owns a small business in Drayton Valley that specializes in programming, website development and hosting, office services, computer repairs and sales. Martha has developed a number of programs for the oil and gas industry as well as the lumber industry that are customized to meet clients' needs, including: Maintenance Management/Purchasing, Management of Change and Vessel Inspection (V-Track).

9:00 a.m. — 12:30 p.m.

Establishing an Effective Turnaround Management Process

Workshop Leader:

E.J. (Ted) Lister, President and Principal Consultant, Lister Management Inc.

Managing turnaround projects in today's environment can be extremely stressful. Lack of control and knowledge of project status leaves management with uncertain expectations of established performance targets. The purpose of the Turnaround Management Process is to provide a method of consistent management for all turnaround tasks and events using established, clearly defined, best-practice guidelines and procedures.

During this interactive workshop, Ted Lister will demonstrate how to develop a defined Turnaround Management Process and successfully implement turnaround management best-practices to ensure consistent management and control of all turnaround projects.

Specific topics to be covered include:

- The Change Management Model™ — responsible for successfully developing and implementing an effective Turnaround Management Process
- How to identify improvement opportunities
- How to develop a defined process
- How to successfully implement best-practices
- The Turnaround Management Model
- Support resources and associated responsibilities
- Proven results — a case-study of enhanced turnaround performance

Attend this valuable workshop and discover the secret to establishing an effective best-practice Turnaround Management Process, so you can achieve significant performance improvements in all key performance areas. Sign up today — space will be limited to allow maximum benefit for participants.

Ted Lister is an independent Performance and Change Management Consultant specializing in human resource and production asset performance. His expertise in plant Turnaround and Routine Maintenance Management, combined with his expertise in the management of change, has provided international clients with expert advice on successfully developing and implementing best-practice Turnaround and Routine Maintenance Processes. Ted has developed several Turnaround Management training materials and instructed numerous seminars and workshops at an international level and is the author of the book "Successful Change Management".

1:30 p.m. — 5:00 p.m.

SHUTDOWNS SUPERCONFERENCE 2003

Register and pay by
October 3, 2003 and receive a
copy of "Practical Management
for Plant Turnarounds" by
John A. McLay, P. Eng., R.E.T., P.E.

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**YES! Please register the following delegate(s) for
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(Please photocopy for additional delegates)

Conference Code:
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FEE PER DELEGATE

- Conference only \$1599 + \$111.93 (7%) GST = \$1710.93
 Conference & Workshop A or B \$2099 + \$146.93 (7%) GST = \$2245.93
 Conference & both Workshops A and B \$2599 + \$181.93 (7%) GST = \$2780.93
 I cannot attend but would like information regarding conference materials

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PAYMENT MUST BE RECEIVED PRIOR TO THE CONFERENCE

PROGRAM MATERIALS

Conference participants will receive a comprehensive set of conference materials prepared by the speakers. These materials are intended to provide the participants with an excellent reference source after the conference. Materials will be distributed 1 hour prior to the conference.

HOTEL RESERVATIONS

For information on hotel room availability and reservations, please contact Hyatt Regency Calgary at (403) 717-1234.

CANCELLATION AND REFUND POLICY

Substitution of participants is permissible without prior notification. If you are unable to find a substitute, please notify *The Canadian Institute* in writing up to 10 days prior to the conference date and a credit voucher will be issued to you for the full amount paid, redeemable against any other *Canadian Institute* conference. If you prefer, you may request a refund of fees paid less a

15% service charge. No credits or refunds will be given for cancellations received after 10 days prior to the conference date. *The Canadian Institute* reserves the right to cancel any conference it deems necessary and will, in such event, make a full refund of any registration fee, but will not be responsible for airfare, hotel or other costs incurred by registrants. No liability is assumed by *The Canadian Institute* for changes in program date, content, speakers or venue.

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