Corporate Standard for

Management of Change

MOC 01000

Version	Date	Primary Author or Approver
1.0	27 January, 2021	Enrique Campos-Sutter

Contents

Tables

Figures

1   Introduction

This *Corporate Standard for Management of Change* (MOC 01000) establishes requirements that shall be met to manage change across the enterprise with the following objectives:

- To systematically manage changes to facilities and operations in order to prevent incidents and improve reliability and efficiency by identifying and managing risks and risk reduction activities associated with the changes.

This standard provides guidance in alignment with the Chevron Tenets of Operation and the company's commitment to Operational Excellence (OE) to achieve excellence in our management of change. This process includes principles of continuous improvement to assist operating facilities achieve best-in-class performance within the industry over time.

This standard specifies management of change requirements and instructions for implementation across all in-scope facilities. The timeline for implementation of this standard in each Business Unit will be determined in Business Unit shaping plans.

1.1   Scope

This Standard applies to all Chevron Business Units (BUs) as listed in Appendix A.

MOC 01000 sets the corporate expectations for:

- Requirements to assess, plan, approve, implement, communicate (or inform), startup and close-out a change

- Requirements to assist Chevron Business Units and Functions in developing local Management of Change (MOC) instructions, procedures and documentation

1.2   Regulations vs. Requirements

Some of the work described in this standard might be required by regulation. In those cases, the relevant requirements, data, and documents required by this standard could be used to manage and demonstrate compliance with applicable regulations. However, this document is not a regulatory compliance document, and compliance with all the requirements of the process described in it may not be necessary for the purpose of achieving compliance with applicable regulations.[1]

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[1] This process is a management system document and is not considered or intended to be recognized as generally accepted good engineering practices (RAGAGEP) under the U.S. Occupational Safety and Health Administration (OSHA) Process Safety Management of Highly Hazardous Chemicals standard (29 CFR 1910.119). Instead, the applicable codes and standards adopted by Chevron are RAGAGEP.

In the context of this document, the words **shall** and **should** are defined as follows:

> **Shall** – denotes requirements considered mandatory for compliance at all in-scope facilities. "***Shall"*** *requirements* must be met as specified. For requirements that are not covered in MOC documents, a facility **shall** document how it is meeting the requirements.

> **Should** – denotes requirements recommended for adoption. "**S**hould" *requirements* are to be met as specified in the supporting instructional documents unless an **equivalent** alternative strategy is in place and approved by the *Process Safety BIN*

Requirements are explained in detail in the body text that follows each summary. Abbreviations are sometimes used in the summaries, and in these cases, the full spellings of the terms that the abbreviations represent are provided in the body of the text as well as Appendix A.

1.3   Standards and Instructions

Figure 1 and

Table 1 illustrate the hierarchy of MOC 01000 and its supporting documents. The overall intent of these documents is to enable effective implementation, sustainable execution, and standardization where necessary.

Standards and Instructions

Management of Change Standard
Describes enterprise program for managing changes for facilities and operation

Corporate Instructions
Supporting documents that describe how requirements shall be met

Local Instructions /Procedures
Implementation details for standard as necessary managed in the business units

Standard = What   Instruction = How

Figure 1: MOC Standards and Instructions

Instructions (see Figure 1) are intended to supplement this MOC standard by providing additional detail on how requirements shall be met and to promote consistent application of management of change in our facilities and operations

Table 1: MOC Standards and Instructions

MOC Standard	
MOC 01000	*Corporate Standard for Management of Change*
MOC Instructions	
MOC 01100	*Instruction for Preparation and Management of Documents [in progress]*
MOC 01110	*Instruction for Identifying Change*
MOC 01120	*Instruction for Managing Change in Facilities and Operations [in progress]*
MOOC 01130	*Instructional Guide for Management of Organizational Change for Process Safety*
MOC 01140	*Instruction for managing Well Construction Management of Change [TBD]*
MOC 01150	*Instruction for Low Complexity Changes [in progress]*

1.4 Definitions

Appendix B of MOC 01000 defines specific terms and their intended meaning when used in this document.

1.5 Operational Excellence Expectations Met

This MOC standard is designed to meet or exceed the asset management expectations associated with the Process Safety, Reliability, and Integrity OE focus areas and to support expectations associated with other OE focus areas and common expectations such as Risk Management, Workforce Safety (i.e., Managing Safe Work (MSW)) and Incident Investigation and Reporting (II&R).

2 Management of Change

Chevron uses a seven-step process to ensure risks that are introduced by equipment, operational and organizational changes are understood and managed through identification and implementation of appropriate risk mitigation steps.
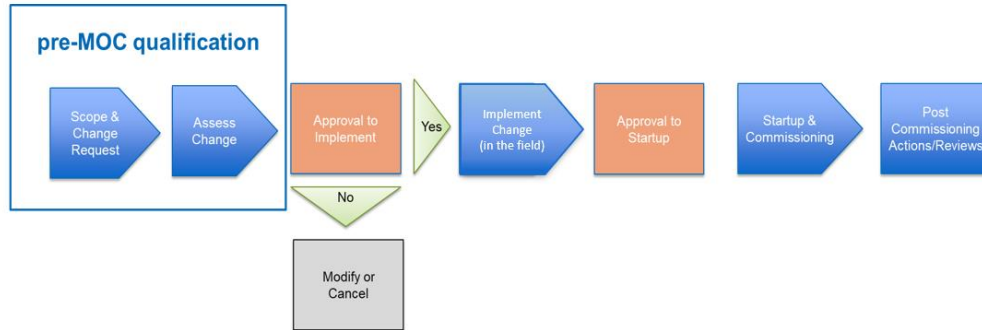

Figure 2: High level Chevron Management of Change summary workflow

The MOC process is not intended to be used to capture or explore ideas. Before initiating an MOC, the MOC Leader **shall** perform the following "pre-qualification" activities prior to allowing (or accepting) a MOC into the system.

2.1 Pre-Qualification of Change

MOCs **shall** follow the pre-qualification steps sequentially and the MOC **should** only be initiated when the MOC Leader (i.e., individual leading the change) believes the specifications of the change are final and ready for implementation.

Note: This step relies on the qualitative assessment skills of competent reviewers rather than prescriptive rules

In the pre-qualification step, the MOC Leader **shall assure that the following are completed**:

2.1.1 Scope and Change Request

- Assure that the scope of the change, explanation of the proposed change, including the reason(s) for performing the work, desired results, technical design, and appropriate implementation instructions (i.e., technical basis of design) are determined.

2.1.2 Assess Change

- Assure that the Change Category [may be multiple categories] and Hazard Evaluation Team based on change category(s) are determined.

- Assure that the impact of the change is assessed through technical/functional reviews (***team based either face-to-face, where practicable, or virtual***)

- Coordinate with Technical Safety/ Risk Management to determine appropriate risk assessment and risk mitigation activities, including identification of:

    - Required stakeholders and other functional groups

    - Training and competency requirements

    - Communication plan(s)

    - Implementation and risk mitigation plan

    - Documentation to be updated (i.e., process safety information)

2.2   Approval to Implement Change

In the Approval to Implement step the <u>MOC Approver</u> **shall assure the following**:

- Validate the rigor and quality of the reviews and risk assessments completed in the pre-qualification step.

- Assess the change (or cancellation of the change) for potential impacts on:

    o Corporate and legal requirements and commitments

    o Other ongoing projects, changes and initiatives

    o Relevant stakeholders

Only after all prior steps are completed may an MOC Approver approve the installation or implementation (i.e., begin construction) of the change.

2.3   Implementation

In the implementation step the <u>MOC Leader (& MOC Team Member(s)</u> **shall**:

- Implement the change in accordance with the Implementation Plan

- Identify, track, and verify completion of assigned tasks until the change is fully implemented and ready for commissioning (i.e., startup), and documents are properly updated.

2.4   Approval for Start-up

Approval for start-up from appropriate Line Management is required, and a pre-start up safety review (PSSR) by the <u>MOC Leader</u> (or delegate) and appropriate stakeholders is required.

2.5   Startup & Commissioning

In the startup & commissioning step the <u>MOC Leader and Team Member(s)</u> **shall**:

- Validate completion of implementation steps necessary for successful turnover and commencement of the change

- Conduct a pre-startup safety review (PSSR) with stakeholders

- Identify open or outstanding tasks and determine whether startup can proceed prior to their completion

- Obtain approval for startup

- Put the change into effect

2.6 Training and Communication

Training ensures affected employees understand their revised role and are competent in execution of the change through the following tiered approach:

- awareness and/or

- knowledge and/or

- operational competency training

For each change, the person assigned to lead training will deliver the appropriate level of training/communication to address the competency requirements. As such, face-to-face or virtual communications are encouraged. Where appropriate, document discussions during turn-over, safety meetings or similar local activities.

Communication ensures appropriate internal and external stakeholders are made aware of the change and includes the need for notification before work begins, temporary or permanent warning signs, barriers and other hazard communication requirements. This may require the engagement of regulatory and/or public affairs staff.

2.7 Post Commissioning Actions & Review

In the Post Commissioning Review step the MOC Leader and MOC Team Member(s) shall:

- Verify the change was effective in achieving the desired outcome and complete Quality Effectiveness Review

- Manage and track outstanding tasks (e.g., all information is updated and in the system of record(s) (SoR), required communication and training are complete)

- Close-out the MOC

3 Additional MOC Areas of Application

The following subsections describe the desired outcome of each MOC area of application and the requirements necessary to achieve the intended results

*Note: Some business units (BUs) may use different position titles than those listed in this document. In those cases, responsibilities **shall** be assigned to equivalent roles and list equivalency documented in the Local Instructions / Procedures documents.*

3.1 Capital Projects

Engineering and construction contractors shall implement a management of change process during the design and construction phase of capital projects in accordance with the requirements of the *Project Management of Change Handbook 7.1.8 Project Management of Change.*

3.2 Chevron Environmental Management and Real Estate Company (CEMREC)

CEMREC applies MOC to both the Environmental Management and the Real Estate function (each having a separate and distinct process). These processes require the screening of permanent, temporary and emergency changes to facilities, operations or services under their operational control

For more information on scope and tools see: **CEMREC SharePoint site**

3.3 Organizational Change

Organizational change is a normal and inevitable part of business. Continuous improvement for the purpose of safe, reliable, and efficient operations is often supported by organizational change. The objective is to manage the associated risks and mitigate the potential for a process safety incident as a result of an organizational change in a Chevron facility or operation.

Instructional Guide for Managing Organizational Change for Process Safety (MOOC 01130) provides consistent terminology, minimum expectations, and appropriate guidance for the risk management of organizational and personnel change for Chevron operated facilities and operations.

3.4 Wells

Well Construction – Management of Change (WC-MOC) is designed to identify, assess, document and manage deviations to the approved plan prior to implementation.

A WC-MOC is a change to a planned design, procedure, or an approved document, or a specific element of a Global Standard or approved procedure with a finite duration (i.e., time-bound or scope-bound [e.g., project/well, group of wells])

For more information on Well Construction - Management of Change (WC-MOC) Global Process Standard [DCM-SP-102107-D]

4 Resources, Roles, and Accountabilities

4.1 Governance

Governance of Management of Change manages the Enterprise Management of Change Standard and accompanying instructions.

The details of the MOC Governance process are covered in MOC 01100 – *Instruction for Preparation and Management of Documents*

4.2 Organization

Enterprise MOC governance is achieved through the interaction of the following groups:

- APPS Process Safety Business Improvement Network (BIN), Sponsored by the GM, Process Safety
- Task Force (Ad Hoc, Agile Teams), as applicable

Business Improvement Network

The Business Improvement Network develops and maintains standards. Table 3 outlines the expectations of a BIN.

Each BIN is chaired by a BIN Leader. Representation will be managed by the BIN Leader as appropriate.

Additional representatives may participate at any time with the permission of the BIN Leader. The BIN Leader is responsible for maintaining the official representatives register.

Working Teams

Working teams may be formed at any time to create, revise, or revoke a standard or instruction. The team may be initiated by any interested group to create a proposal for the APPS Process Safety BIN.

The working team **shall** consist of technical experts for the asset classes affected by the scope of work. The team **shall** prepare a team charter that states:

- Name of the team leader
- Proposed scope of work
- Business need
- Proposed work team members

This charter **shall** be approved by the Process Safety BIN as appropriate based on the proposed scope of work.

4.3 Voting

A two-thirds vote by the Process Safety BIN without comments **shall** constitute an approval of an MOC standard or Corporate Instruction in all MOC matters except as

defined previously in this governance section. Votes with comments **shall** be recycled to the working team for review and resolution. Subsequent votes with two-thirds approval and no new or unresolved comments **shall** constitute approval and progression to the next step or final publication.

4.4   MOC Document Management

MOC standard and instructions **shall** be managed and maintained according to MOC 01100. These **shall** be reviewed and endorsed or updated at least every three years.

The following sub-sections describe the roles and responsibilities of personnel involved in the establishment and execution of MOC. In addition, competency management and role-specific requirements as they relate to MOC are explained.

Accountabilities are divided into two categories of roles:

1. 'Governance of MOC' roles – ensure the MOC process is designed, developed, implemented and followed, and that resources are available and competent to execute MOC

2. 'Execution of MOC' roles – conduct MOC in accordance with BU/FN specific MOC requirements

Note: Some business units may use different position titles than those listed in this document. In those cases, responsibilities **shall** be assigned to equivalent roles.

4.5   Leadership

Desired Outcome
Leaders are active MOC champions who create alignment, facilitate communication, gain commitment, help shape and reinforce desired behavior, and arrange resources to enable implementation, assure sustainability, and drive continuous improvement

Summary of Requirements and Expectations	**To Be Met By**
• Manages the Enterprise MOC process and its supporting Corporate standards and instructions • Drives compliance with this Standard and BU/FN documentation • Evaluates demand for central SME resources to steward MOC across the enterprise • Performs an annual review of systemwide MOC performance • Establishes a Management of Change Steering Committee designated to drive continuous improvement in management of change quality and performance.	APPS GM, Process Safety

• Meets at least quarterly to focus on the following issues for the facility:
  – Quality of management of change application
  – Removal of barriers to success
  – Cultural changes that enable or enhance improvements
  – Priority of work and allocation of resources
• Reinforces roles, responsibilities and accountability for management of change performance
	Local MOC Steering Committee (or equivalent body), should include at least the following positions for the facility:
	• Operations/Production Leader
	• Engineering/Technical Leader
	• Reliability Leader
	• Process Safety Manager/Team Leader

	• All facility Division Operations/ Production Superintendents/Leads • HSE Leader
• Establishes a process to maintain MOC Organizational Capability (OC) throughout the facility	Local ,of the APPS PS BIN, MOC Sponsor or Advisor or Process Safety Focus Area Sponsor
• Establish and sustain OC	Local work groups
• For personnel (employee or contractor) in positions with Management of Change responsibilities for fewer than six months, review status of the onboarding program and verify competencies • Ensure MOC training is included in onboarding requirements of personnel with MOC responsibilities. • Review and endorse results from MOC OC activities performed by respective organization LT	Managers (M&R, Facilities Engineering, Operations/Production, and Procurement) or respective organization LT

4.6   Local Management of Change Steering Committee

The purpose of a local Management of Change Steering Committee (MOCSC) is to drive continuous improvement and quality in managing change through implementation of the Chevron Operational Excellence Management System (OEMS) at the facility level.

The MOCSC **should** meet at least quarterly and focus on three primary leadership responsibilities:

- Validate the MOC system is working as intended

- Establishing, reviewing and acting on leading and lagging metrics to assess and improve the performance of the MOC system

- Reviewing and acting on Lessons Learned which are relevant to the MOC system

The MOCSC's scope of responsibility **should** include:

- Reinforcing role, responsibilities and accountability for management of change quality, performance and processes (for example, periodically evaluating the performance of integrated work processes, such as Risk Management or PSI, and providing additional stewardship, as needed)

- In coordination with the management system cycle (MSC), periodically evaluating:

    – the performance of the MOC system through local risk-based process safety or Management reviews

    – Leading and lagging metrics detailed in Section 5, "Measurement and Verification" to verify the effectiveness of the management of change metrics used to assess performance

    – Lessons learned as applicable to the MOC process, to address information and examples from recent incidents that are relevant to the facility

4.7 Management of Organizational Capability (MOOC)

The appropriate Local Leadership **shall** establish a process to maintain Management of Organizational Capability (MOOC) throughout all facility organizations

Because MOC responsibilities span nearly all work groups at a facility, each work group must understand its required contribution to meeting MOC requirements and must establish and sustain the necessary organizational capability. Therefore, as part of the Management Review Cycle (MSC) review process, the Facilities Engineering Manager, Operations or Production Manager, Process Safety Manager and MOC Advisor **should** perform the following activities in their respective organizations:

- Review open positions and assess their impact on MOC performance, and review and approve plans and anticipated timing to fill positions.

- For personnel (employee or contractor) in positions with Management of Change responsibilities for fewer than six months, review status of the onboarding program and verify that these new personnel have the necessary competencies to effectively perform the required job duties.

- Review the list of personnel (employee or contractor) who have not received the required MOC training pertinent to their positions, and review and approve plans to close all training gaps.

These activities may be delegated to the organization leadership team, but a summary of results for each work group **should** be reviewed and endorsed by the organization manager.

4.8 Roles & Responsibilities

Key roles and responsibilities for the MOC process at each facility **shall** be designated. The key roles include an MOC advisor and MOC sponsor in the PSRI organization. Roles shall also be designated to implement and sustain:

- Training to address roles and responsibilities under the MOC standard and instructions

- Appropriate functional / technical reviewers to address changes

- Administrative support for the MOC database

- Tracking changes to closure

4.9 Competency Management

Two types of competency are required for personnel who have MOC roles and responsibilities:

1. Change: Knowledge of the risks and mitigations necessary for the change

2. MOC Process: Knowledge of the MOC process

Table 4 provides descriptions, and Table 5 provides targets and training for personnel who have MOC roles. For reviewers, the "change competency" applies to their area of expertise only.

Table 4: MOC Competency Descriptions

Basic	Skillful	Expert
Change		
Sufficiently knowledgeable of Operations to comprehend the change	Able to identify the SMEs who should be involved in the MOC	Able to identify and assess risk introduced by the change and determine mitigations needed or work with necessary with parties to do so
MOC Process		
Understands their own responsibilities in the MOC process and can fulfill them	Knows MOC requirements, how they are met by the MOC procedure and can provide guidance on both the process and the MOC System and Tools	Able to write local instructions, act as an SME for corporate documents, train others, and provide guidance on the MOC procedure, System and Tools

Table 5: MOC training requirements by Role

MOC Role	Change	Process	MOC Training
MOC Leader	Expert	Skillful	MOC System training; MOC CBT every three years
Technical/ Functional Reviewer(s)	Expert	Basic	MOC System training; MOC CBT every three years
Approver	Skillful	Basic	MOC System training; MOC CBT every three years
Action Responsible Party(ies)	Expert	Basic	MOC System training; MOC CBT every three years
MOC Advisor/Specialist/Coordinator	Skillful	Expert	MOC System training; MOC CBT every three years; CoP for MOC
Document Controller	Basic	Basic	MOC System training; MOC CBT every three years

The effectiveness of MOC relies heavily on the competency of all involved personnel. To enable workforce competency, requirements for written instructions and training are provided as follows.

In the case that a MOC standard or instruction is available but is not fully adopted by a facility because the standard or instruction does not meet local requirements, the facility's Process Safety Manager and/or MOC Sponsor/Advisor **shall** verify that:

- Documented differences address local requirements and satisfy the MOC requirements

- In the case that documented differences do not satisfy the minimum MOC requirements, approval is obtained from the APPS GM, Process Safety to use the revised standard or instruction.

The BU Process Safety Manager and/or MOC Sponsor/Advisor **shall** establish a process for the review and updating of facility-specific instructions to verify that the facility-specific instructions meet the requirements of the enterprise standard and instructions, and incorporate improvements and lessons learned.

Training

The Process Safety Manager and/or MOC Sponsor/Advisor **shall** establish and maintain training programs for personnel who have MOC roles and responsibilities. Each training program **shall** provide employees with the opportunity to develop the skills and knowledge to perform their MOC roles and responsibilities competently, in an incident-free manner, and in compliance with all applicable laws, regulations, company policies, and requirements.

As a minimum, each facility's training program **shall** cover the following items:

- List of personnel who may initiate change

- Verification methods and documentation of training effectiveness (such as pass/fail and test scores)

- Documentation of the dates of training

- Defined competencies, technical expertise, and certification requirements (for example, a training matrix for MOC skills and knowledge by position at the facility)

MOC training requirements **may** apply to contractors as well. The Process Safety Manager and/or MOC Sponsor/Advisor or CHESM Advisor **should** verify that the contract company adequately trains its contract workers based on their role in the MOC process). When a contract company lacks the competency to train its workers on MOC, the facility **may** provide the required training directly to the contract workers with the participation and cooperation of contract company management and after review and approval by the local Chevron Law Department. For MOC roles that can impact process safety, the Process Safety Manager and/or MOC Sponsor/Advisor **should** periodically audit contractor training documentation or certifications (or both) for positions associated with managing assets.

Contractor training **should** include an overview of the MOC process, the objectives of the MOC process, and the relevance of their roles in executing those objectives.

5   Measurement and Verification

Performance monitoring is essential to verify that the MOC process is working as it should at the enterprise and BU levels. The Process Safety, Technical Safety Manager and/or MOC Sponsor/Advisor is responsible for assuring the MOC process is working properly

This section requires standard MOC performance metrics and supports a consistent understanding of the terminology and view of process effectiveness across the enterprise. These metrics indicate asset health as measured against management expectations.

Desired Outcome	
MOC performance metrics are established to monitor the performance of the assets and effectiveness of the MOC process	
Summary of Requirements and Expectations	**To Be Met By**
• Verifies that MOC performance metrics are reported on a quarterly basis	Manager, Process Safety, Technical Safety (or MOC Sponsor)
• Consolidates metrics reported for MOC assets • Serves as a SME on calculation methodology, resolves reporting queries, and drives alignment across assets	Assigned by BU (typically MOC Advisor/Coordinator)

The Process Safety and/or MOC Sponsor/Advisor **shall** verify that MOC performance metrics are reported on a quarterly basis to the GM, Process Safety. The BU assigned analytics resource (e.g., MOC Advisor) **shall** consolidate metrics reported, serve as a SME on calculation methodology, resolve reporting queries, and drive alignment across assets.

Required MOC performance metrics and a descriptive framework are provided in Table 5.

Facilities **may** establish and monitor additional management of change performance metrics.

Instructions or job aids may be published by APPS GM, Process Safety to provide details on calculations and reporting requirements.

Table 6. MOC Metrics Framework

Category	MOC Metric
Leading Indicator(s)	Number of permanent MOCs approved for startup but not closed after 180 days
Lagging Indicators	Number of actual or potential level 2 & 3 incidents where the investigation identified MOC as a root cause
Efficiency Indicators	Average number of days between MOC placed into operations (i.e., start-up date) and the date the MOC closed

6 Continuous Improvement

Governance for this process is defined by the OE MSC. The assessment and audit protocol used to validate MOC process design and effectiveness is developed and maintained by the APPS Process Safety BIN and endorsed by the OE Audit group.

MOC **shall** be assessed and will include the following activities on a three-year cycle:

- Annual: BU self-assessment led by the BU. Corporate representative engagement is at BU discretion

- Year 3: Corporate OE Audit

The Process Safety and/or MOC Sponsor/Advisor **shall** conduct a self-assessment using the MOC gap assessment protocol and develop a gap closure plan. The gap closure plans **shall** be tracked to completion and shared with the MOC Steering Committee.

The APPS GM, Process Safety **should** consolidate the annual MOC self-assessments from all facilities and use the data to develop common strategies and actions linked with the facility business plans, which are intended to drive continuous improvement and standardization across business units.

The APPS Process Safety BIN supports prioritization of process gaps and integration with other strategies to generate the facility business plans; however, the facilities are responsible for gap closures. In some circumstances, gap closure efforts may extend over multiple years. If the gap closures extend over multiple years, the facility shaping plan for MOC should be updated to reflect the specific plans for closure and the appropriate resources s**hall** be assigned to the effort and leadership engagement and awareness of opportunities.

7 Document Control Information

7.1 Approval and Review

MOC 01000 is approved and reviewed as noted in Table 2.

Table 2: Document Control

Description	Date
Approval Date	
Next Process Document Review	

7.2 Version History

MOC 01000 has been revised as summarized in Table 3.

Table 3. Revisions

Version No. Change				
From	**To**	**Date**	**Summary of Changes**	**Approved by**
0.0	1.0	xxx	Initial release	xxx

8 References

The following documents inform or are referred to in the content MOC 01000:

MOC 01110 – *Instruction for Identifying Management of Change*

MOC 01120 – Instruction for Managing Change [in progress]

MOC 01130 – Instructional Guide for Management of Organizational Change for Process Safety [MOOC]

DCM-SP-102107-D Well Construction – Management of Change

Operational Excellence Data Reporting Standard (OEDRS)

OE Corporate Required Standard – Asset Integrity

OE Corporate Required Standard – Process Safety Information

Guidance for Process Safety Information

OE Corporate Required Process – Managing Safe Work

OE Management System Cycle

OE Risk Management Process

Appendix A   In-scope business units

Upstream

- North America

  - Appalachian Mountain Business Unit (AMBU)

  - Canada Business Unit (CBU)

  - Gulf of Mexico Business Unit (GOMBU)

  - Mid-Continent Business Unit (MCBU)

  - San Joaquin Valley Business Unit (SJVBU)

  - Rocky Mountain Business Unit (RMBU)

- Eurasia-Pacific

  - Asia South Business Unit (ASBU)

  - Australasia Business Unit (ABU)

  - IndoAsia Business Unit (IBU)

  - Tengizchevroil (TCO)

- Middle East, Africa and South America

  - Latin America Business Unit (LABU)

  - Nigeria/Mid-Africa (NMA)

  - Southern Africa Strategic Business Unit/Cabinda Gulf Oil Company (SASBU/CABGOC)

  - Eastern Mediterranean Business Unit (EMBU)

  - Saudi Arabia/Partitioned Zone (SA/PZ)

Midstream

- Chevron Pipeline and Power (CPP)

- Chevron Shipping

- Noble Midstream

Downstream & Chemicals

- Products and Lubricants (Americas and International)

- Manufacturing

- El Segundo Refinery

- Pasadena Refinery

- Pascagoula Refinery

- Richmond Refinery

- Salt Lake Refinery

- Oronite

Technology, Projects and Services

- Downstream Technology and Services
- Chevron Environmental Management and Real Estate Company

Appendix B   Abbreviations and Definitions

When used in MOC 01000, the following abbreviations represent the specific terms shown.

Abbreviation	Term
ACD	add/change/delete
AESTL	Area Engineering Support Team Lead (e.g., Design Lead, Engineering Team Lead)
APPS	Asset Performance & Process Safety
BIN	Business Improvement Network
BU/FN	Business Unit/Functional Area
CEMREC	Chevron Environmental Management and Real Estate Company
CES	Chevron Engineering Standards
CoP	Community of Practice
HSE	Health, Safety and Environment
II&R	incident investigation and reporting
M&R	Maintenance and Reliability
MOC	Management of Change
MOOC	Management of Organizational Change
MSC	Management System Cycle
OC	Organizational Capability
OE	Operational Excellence
OEMS	OE Management System
OSHA	(U.S.) Occupational Safety and Health Administration
P&IDs	Piping and Instrumentation Diagrams
PHA	Process Hazard Analysis
PMOC	Project Management of Change
PSI	Process Safety Information
PSRI	Process Safety, Reliability & Integrity
PSSR	Pre-Startup Safety Review
QA	Quality Assurance
RIK	Replacement-in-Kind
SME	Subject Matter Expert (or expertise)
SoR	System of Record
WC-MOC	Well Construction Management of Change

Definitions

When used in MOC 01000, the defined terms listed in the following table have the specific meanings shown.

Term	Definition
asset	The lowest configuration of a facility, system, or piece of equipment that is separately identified in the Enterprise Asset Management (EAM) or Asset Performance Management (APM) systems. Assets are structures, fixed equipment, and nonfixed equipment, unless otherwise specified and based on context.
BIN	Team of Subject Matter Experts within the Chevron Technical Center and the business; Possess technical expertise and practical knowledge; Lead and assist across the Enterprise or Business Segment (as applicable) in a focus area. Have business / shaping plans that they commit to executing; Develop & deploy strategies and best practices; Provide SME V&V.
continuous improvement	A focused, company-wide formal process of ongoing incremental innovation. There are various methodologies to optimize all processes; allowing organizations to reduce waste and defects, quicken performance and enhance products.
gap closure plan	The plan developed to close prioritized gaps and identify resourcing requirements. The gap closure plan may also be integrated into business plans
hazard evaluation team	A team of cross functional representatives to assess hazards of a suggested change to evaluate if the change should be implemented and ensure any risk identified are mitigated prior to implementation.
instruction	A document that provides detailed directions on meeting the requirements and expectations specified in a standard.
Process Safety Information (PSI)	Includes all technical information necessary to support hazard identification and risk analyses of processes and facilities (as determined by application of the *Corporate Riskman2 Procedure*) and to support ongoing operations. PSI may include engineering drawings and calculations, design specifications for process equipment and instrumentation, material safety data sheets, operating limits, control and shutdown logic, or reactive hazard lists.
organizational change	Any change in structure, responsibility, personnel or working condition that has the potential to impact the consequence or likelihood of a major process safety incident.
major process safety Incident	An unplanned, or un-controlled, loss of primary containment which meets the criteria for a tier 1 and tier 2 process safety event for any Chevron operated facility or operation. *NOTE: API RP-754 is specifically applicable to processing facilities. For the purpose of this MooC process Chevron has extended this definition to apply to all Chevron operating facilities and operations.*
Administrative MOCs	Applies to Policy, Procedures or Process: Changes to, or deviations from, requirements in a controlled document or non-material change to a critical document.
Organizational MOCs	Applies to People: Permanent change in an organizational structure or change is personnel with specific knowledge or experience.
Task Force (ad Hoc, Agile Teams)	Team of teams from the business and center; Possess technical expertise and practical knowledge; Make decisions on standardization, continuous improvements, and change for focused initiatives in an agile manner; Have specific goals and charter with defined timeline to deliver results; Sponsored by BIN or Asset Class GMs or other governing body; Solutions / output from agile teams are absorbed into the BIN for sustainability, measurement, verification & continuous improvement.
standard	A document that defines the asset-specific requirements to manage integrity and reliability.

Term	Definition
can	Denotes a possible action or capability to perform an action.
may	Grants permission for a provision or denotes a provision that is optional.
responsible	Appointed to complete or take part in a task, action, or activity required for implementation of or compliance with this process. Responsibility can be shared or delegated.
shall	Denotes requirements considered mandatory for compliance at all in-scope facilities. *Shall requirements* are required to be met as specified. For requirements that are not covered in MOC documents, a facility **shall** document how it is meeting the requirements.
should	Denotes requirements recommended for adoption. S*hould requirements* are to be met as specified in the supporting instructional documents unless an **equivalent** alternative strategy is in place and approved by the *Process Safety BIN.*