Member Checklist

In addition to reviewing your member reports for accuracy, new members should also:

1. Sign up to receive email messages from the organization. These emails are a good way to stay engaged with the organization and receive program updates. Be sure to check "member communications" in your selection of topics. You will also receive reminders about the *monthly member conference call* with a link to the minutes of the previous month's call. The link to the signup form is here: http://pipelineawareness.us1.list-manage2.com/subscribe?u=50f90699e3869a0430b9ee4cb&id=dfd0ec084d

2. Enter a reoccurring meeting in your personal calendar for the *monthly member conference call*. This call is always on the first Tuesday of each month at 11:00 am MT and is open to the public. The link to join the web meeting is: Join Microsoft Teams Meeting and the call-in numbers are: **+1 469-998-7405,,886430185#**

3. Join our social media at the links below:
   http://www.linkedin.com/groups/Pipelineawareness-4081316
   https://www.linkedin.com/company/pipelineawareness
   https://www.facebook.com/pipelineawareness

4. Update your company's emergency response capabilities in the online reporting system for emergency response capabilities. This system is freely available to all pipeline companies and emergency response agencies. The landing page with instructions and background info is at this link: http://pipelineawareness.org/stakeholder-resources/emergency-response-capabilities/

5. Provide a company profile document containing your company information to be posted in the public OneDrive folder accessible from the **Pipeline Member Information** link under **Stakeholder Resources**.

6. Provide your company's pipeline information for Pipelines Nearby and the PipeVision mapping application. Participation in these applications is covered by the base membership dues. Pipelines Nearby is a mobile friendly web application that provides leak, hazard and emergency response information for the five member pipelines closest to a specific location. If you want to check it out, you can access the application from your computer at this link: http://www.pipelinesnearby.org/, or from your smart phone by using the web browser and searching on pipelinesnearby.org. The phone application will ask for permission to access your current location. The pipeline data you submit for inclusion in the application should identify the product transported. All the other information is taken from the member database. The PipeVision mapping application is a password protected mapping application. Agencies must request access. Additional information about pipeline size and evacuation distance along with the ability to link a company document are elements in the application.

7. Familiarize yourself with the online file sharing system for program documentation. The folder structure and files are organized by YEAR – PROGRAM – DESCRIPTION. Your company email address will be entered in the system when you join and you will receive an email asking you to create your own password. If you forget your password later, just click the "forgot password" link to receive an email with instructions about resetting your password. The direct link to the file sharing site is: https://pipelineawareness.sharefile.com/. You'll be able to download complete folders as well as individual files in PDF format. If you have trouble getting in, your company network may block file sharing sites. Try sending a request to your IT department and ask for specific permission to access this url. Sharefile is a very reputable company with excellent security and virus protection.

8. Review the online feedback form at: https://pipelineawareness.org/request-info. You will receive email messages from this form when stakeholders submit requests in your counties. These messages may include requests for training, maps, or other specific member information. The Association may respond to requests for general information. However, members should respond to all the requests and keep copies in their own documentation.

9. Additional information about each of the programs is shown on the Program Information page, at this link: http://pipelineawareness.org/member-resources/program-information/ Downloading the complete PDF file will give you a summary of recent program improvements, the program schedule and all of the current program outlines.

10. Member participation automatically carries over from year to year. The deadline for making changes or signing up for new programs is January 15. The final program dues for the year will be established at the end of January when all participation levels are known. Members will receive an accounting report in Q1 indicating their program dues amounts along with any special invoicing instructions previously provided to the Association. Members will be asked to review this information and to respond if changes are needed. Members shall be issued an electronic invoice for dues and program fees by April 15. If members add programs after the program dues have been established for the year, further adjustments for additional cost sharing will not be made until the following year.

11. Download payment instructions and a signed W9 form for your accounting department at this link: https://pipelineawareness.org/w9

12. Order a sample packet of all the printed materials in the online order form at: https://pipelineawarenessorg.wufoo.com/forms/request-additional-materials/

13. Review the "***Information for PHMSA PAP inspection questions"*** contained in the following pages.

If you have any additional questions, please don't hesitate to ask. Thanks for participating!

Kesley Tweed
Executive Director
(720) 909-8933
kesley.tweed@pipelineawareness.info

1. Administration and Development of Public Awareness Program

1.01 Written Public Education Program

- Verify the operator has a written public awareness program (PAP).
- Review any Clearinghouse deficiencies and verify the operator addressed previous Clearinghouse deficiencies, if any, addressed in the operator's PAP.
- Identify the location where the operator's PAP is administered and which company personnel is designated to administer and manage the written program.
- Verify the date the public awareness program was initially developed and published.

A written program outline is prepared for each program. They are reviewed and updated on an annual basis. The current year program outlines are posted online at: *https://pipelineawareness.org/member-resources/program-information/* ***The outlines for previous years are posted in the program documentation folders for each year.***

1.02 Management Commitment and Support

- Verify the PAP includes a written statement of management support.
- Determine how management participates in the PAP.
- Verify that an individual is named and identified to administer the program with roles and responsibilities.
- Verify resources provided to implement public awareness are in the PAP. Determine how many employees involved with the PAP and what their roles are.
- Determine if the operator uses external support resources for any implementation or evaluation efforts.

The Pipeline Association for Public Awareness and the programs you are participating in should be identified in your written plan or included elsewhere in your list of "external support resources."

Unique Attributes and Characteristics of the Pipeline and Facilities

- Verify the PAP includes all of the operator's system types/assets covered by PAP (gas, liquid, HVL, storage fields, gathering lines etc.).
- Identify where in the PAP the unique attributes and characteristics of the pipeline and facilities are included (i.e. gas, liquids, compressor station, valves, breakout tanks, and odorizer).

The program materials and contain information pertaining to all types of pipelines and products transported.

Pipeline type and odorization of natural gas is specifically addressed in the Pipelines Nearby program.

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1.04 Stakeholder Audiences

- Identify how the operator determines stakeholder notification areas and distance on either side of the pipeline.
- Determine the process and/or data source used to identify each stakeholder audience.
- Select a location along the operator's system and verify the operator has a documented list of stakeholders consistent with the requirements and references noted above.

Program coverage areas are by county. The data sources and the listing of SIC codes are identified in each program outline. The Excavator program is also done on a statewide basis in many states. These full state programs are identified in the Excavator program outline.

The mailing lists are posted in the documentation folders and are sorted by state, county and city. They are in xlxs format and can be filtered or sorted other ways.

1.05 Message Frequency and Message Delivery

- Identify where in the operator's PAP the combination of messages, delivery methods, and delivery frequencies are included for the following stakeholders:

Message delivery method and frequency are identified in the program outlines. Most programs are performed annually and the delivery method is direct mail. Email communications with County Emergency Managers began in 2018.

1.06 Written Evaluation Plan

- Verify the operator has a written evaluation plan that specifies how the operator will conduct and evaluate self-assessments (annual audits) and effectiveness evaluations.
- Verify the operator's evaluation process specifies the correct frequency for annual audits (1 year) and effectiveness evaluations (no more than 4 years apart).
- Identify how the operator determined a statistical sample size and margin-of-error for stakeholder audiences' surveys and feedback.

The program elements for each program are specified in the program outlines. A schedule of activities for each year is posted with the program information on the web site. Progress on the execution of the programs is reported to the members on each monthly member call. A summary of the previous year's program improvements along with the proposed improvements for the current year are presented to the membership at the January Program Meeting. These documents are also retained in the documentation folders.

The frequency of the effectiveness evaluation is no more than 4 years apart. Evaluations were conducted in 2007, 2010, 2014, 2018 and 2022. Refer to the survey analysis letter or review memo for information regarding the findings and recommendations made for each stakeholder audience.

See section 4.01 for additional information on statistical sample size and margin-of-error.

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2. Program Implementation

2.01 English and other Languages

- Determine if the operator delivers material in languages other than English and if so, what languages.
- Identify the process the operator used to determine the need for additional languages for each stakeholder audience.
- Identify the source of information the operator used to determine the need for additional languages and the date the information was collected.

Note: The Excavation Safety Guide – Pipeline Edition includes a Spanish version of the information contained on the inside front cover and on the emergency response pull out poster. The other programs are communicated only in English.

The process used to determine if there is a need for additional languages involves collecting information from participating members and evaluating the information as a committee. The decision to include a Spanish version of the communications to excavators was made at the December 2004 meeting. Because emergency responders and public officials are expected to communicate in English, no additional language versions were deemed necessary for these audiences.

2.02 Message Type and Content

- Verify all required information was delivered to each of the primary stakeholder audiences.
- Verify the phone number listed on message content is functional and clearly identifies the operator to the caller.

All API RP1162 required baseline messages (and where they are located in the materials) are identified in the program outlines. PDF copies of the program materials are available online in the program documentation folders for each year. Printed copies of the current year's materials are available upon request.

Prior to the January meeting each year, members are asked to verify their correct emergency phone numbers and local contact information. This normally involves emailing a spreadsheet with member contact information to all the members and requesting them to review their information. The spreadsheet is normally posted with the announcement for the January meeting.

2.03 Messages on Pipeline Facility Locations

- Verify that the operator developed and delivered messages advising municipalities, school districts, businesses, residents of pipeline facility locations.

Pipeline facility location information is identified in the Public Officials Newsletter program outline as a required message. Pipeline markers, the local one call system, and the National Pipeline Mapping System are identified as the most common ways to locate pipelines. Many members also have their pipeline information available in the Pipelines Nearby application, accessible at www.pipelinesnearby.org

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Each school in the school program has a school specific web page containing an aerial photo of the school grounds with the pipelines identified. The pipeline product, size, and contact information are all shown on the web page as well.

2.04 Baseline Message Delivery Frequency

- Identify message delivery (using the operator's last five years of records) for the following stakeholder audiences:

The message delivery frequency for the excavators, emergency responders, and public officials programs is annual.

2.05 Considerations for Supplemental Program Enhancements

- Determine if the operator has considered and/or included other relevant factors for supplemental enhancements.

Members may use the information contained on the PAPA web site or participation in PAPA programs to enhance their public awareness program. Members are encouraged to request or provide articles on specific topics for inclusion in the Public Officials Newsletter or the Excavation Safety Guide – Pipeline Edition. Member topics that have been included in the ESG – PE address sewer cross bores and logging issues near pipelines. The One-Call Outreach program provides additional copies of the ESG- PE to excavators through each One-Call center's individual programs.

2.06 Maintaining Liaison with Emergency Response Officials

- Examine the documentation to determine how the operator maintains a relationship with appropriate emergency officials.
- Verify the operator has made its emergency response plan available, as appropriate and necessary, to emergency response officials.
- Identify the operator's expectations for emergency responders and identify whether the expectations are the same for all locations or does it vary depending on locations.
- Identify how the operator determined the affected emergency response organizations have adequate and proper resources to respond.
- Identify how the operator ensures that information was communicated to emergency responders that did not attend training/information sessions by the operator.

Merriam-Webster defines liaison as: "communication for establishing and maintaining mutual understanding and cooperation". The communications must solicit an exchange of information regarding an understanding about cooperation on specific matters or activities and can be accomplished through: in person meetings, email communications, via the internet, over the telephone, through regular mail, etc.

An ongoing relationship is maintained with emergency responders through the annual baseline communication which is delivered via direct mail. The packet of information includes: Pipeline Emergency Response Guidelines booklet, Public Officials Newsletter and a custom cover letter by county listing the members in that county.

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Email communications with County Emergency Managers were initiated in 2018. These communications are normally sent on a quarterly basis and are intended to facilitate two way communications with the agencies.

The Pipeline Emergency Response Guidelines Booklet contains a general set of interoperable emergency response procedures. Expectations for the responders and the pipeline operators are contained in the section entitled "Incident Response Steps". Resource information for pipeline companies and emergency response agencies is contained in the Additional Resources section.

The cover letter includes a solicitation for emergency response capability information along with a request for feedback about the content in the Pipeline Emergency Response Guidelines booklet pertaining to expectations of the organizations and coordination of response efforts. It includes a form agencies can use to provide feedback, request a planning meeting, schedule a training exercise or request information from pipeline operators. A postage paid return envelope is included in the packet.

The web site has an online "Feedback / Information Request" form that agencies can use to send feedback or submit requests. The online system sends the message to all the members with facilities in that county. Members will follow up with the agencies directly. Reports of these communications are posted in the "Follow-up Communications" folder in the documentation section for the program.

Members or State Associations occasionally conduct training/information sessions with emergency response agencies. Agencies that do not attend these sessions have access to the training materials provided in the packet of information they receive annually through the mail and that are also available on the web site.

3. Program Evaluation & Continuous Improvement (Annual Audits)

3.01 Measuring Program Implementation

- Verify the operator performed an annual audit or review of the PAP for each implementation year.

Members can refer to the meeting minutes as part of their annual audit process. Information about program implementation is provided during the monthly member conference calls. This information is also contained in the Annual Meeting minutes and January Program Meeting minutes, which are posted to the web site.

3.02 Acceptable Methods for Program Implementation Audits

- Determine how the operator conducts annual audits/reviews of its PAP.

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Implementation audits of all programs are performed internally by the member representatives involved in executing the programs. The Board of Directors also discusses that status of programs during monthly meetings. External consultants are used to provide insight regarding survey results and to provide recommendations for future program improvements.

3.03 Program Changes and Improvements

- Determine if the operator assessed the results of its annual PAP audit/review then developed and implemented changes in its program, as a result.
- If not, determine if the operator documented the results of its assessment and provided justification as to why no changes were needed.

Suggestions for improving PAPA programs are discussed with members at the Program Meeting in January and the Annual Membership Meeting in September. The history of each program is contained in the program outlines. The Annual Meeting Minutes and Program Review Documents are posted for each year.

4. Program Evaluation & Continuous Improvement (Effectiveness Evaluations)

4.01 Evaluating Program Effectiveness

- Verify the operator conducted an effectiveness evaluation of its program (or no more than 4 years following the effective date of program implementation).
- Document when the effectiveness evaluation was completed.
- Determine what method was used to perform the effectiveness evaluation (in-house, by 3rd party contractor, participation in and use the results of an industry group or trade association).
- Identify how the operator determined the sample sizes for audiences in performing its effectiveness evaluation.

Effectiveness evaluations of the Excavator, Emergency Responder and Public Official program activities were conducted in 2007, 2010, 2014, 2018 and 2022. The level of awareness and recall of messages and behaviors compared to studies conducted in previous years is reviewed by the Board of Directors and outside consultants. Results of these evaluations are outlined in the survey assessment letter or review memo posted online in the documentation section. These assessments are reviewed with the members and their input is also solicited.

The program evaluations were based on the results of telephone surveys performed for each audience in 2007, 2010, 2014, 2018 and 2022. 400 samples were taken in 2007 and 2022, and 500 samples were taken in the other years. An external consultant was used to compile the data and report the results. An additional consultants reviewed these reports and provided recommendations for program improvements. Feedback and comments from members and the Board of Directors were also considered in the overall review and recommendations for program improvements.

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<u>Additional Information Regarding Audiences, Methodology and Applicability:</u>

HOMOGENEOUS NATURE OF STAKEHOLDER AUDIENCES:

Each of the three primary stakeholder audiences (excavators, emergency responders and public officials) is considered to be homogeneous. This determination is supported by the 2014, 2018 and 2022 survey responses. When asked the question: "In general, do you feel the information on pipeline safety you have received would be relevant and applicable if you relocated to another part of the country for the same kind of work?" each audience replied "yes" to the question at a rate of 85% or more (public officials – 85%, emergency responders – 92%, excavators – 95%).

The information communicated through the programs is widely applicable to all geographic areas and pipeline systems; additional supporting factors include:

- ***Within specific product categories (i.e. natural gas, hazardous liquids, highly volatile liquids, etc.), the products transported by individual member pipelines have similar characteristics and will behave in a similar manner when released,***
- ***The program materials contain messages applicable to the specific product categories and the products transported by the individual member pipelines,***
- ***The required messages are general in nature and contain basic information that is intended to be widely understood across each audience,***
- ***The laws and regulations governing the operation of pipelines, excavation activities, emergency response and other governmental services are consistent enough from state to state such that the expectations of the audiences are fairly uniform with respect to the subject matter contained in the programs and the level of detail required in the messaging.***

SURVEY METHODOLOGY:

A pure random sample telephone interview methodology is used by the Pipeline Association for Public Awareness because it produces the most accurate information. To provide an acceptable margin of error at a confidence interval of 95%, a minimum of 500 telephone surveys are completed for each audience.

The sample universe is limited to the mailing lists that are used in the previous communication programs. Every excavator, emergency responder and public official in any member's impact area has an equal chance of being interviewed. All surveys are completed using the pure random sample methodology by experienced executive interviewers using Computer-Assisted Telephone Interviewing (CATI) software. The CATI software selects the sample and leads the interviewer through the questionnaire. It automatically adjusts for "skip patterns," and reduces the possibility of interviewer error.

APPLICABILITY:

The surveys should only be used to evaluate the collaborative programs conducted by the Pipeline Association for Public Awareness and should not be classified as "industry"

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or "trade association" surveys. Segmentation of the survey results by operator, state or other separation would reduce the accuracy of the results and not provide any additional information necessary to adequately evaluate the program's effectiveness. The basic principles of research theory can be applied because the sampling method is purely random and the audiences are homogenous. The results are valid for all participating members where the content of the materials adequately address their specific products.

4.02 Measure Program Outreach

- Examine the process the operator used to track the number of individuals or entities reached within each intended stakeholder audience group.
- Determine the outreach method the operator used to perform the effectiveness evaluation (e.g., questionnaires, telephone surveys, etc.).
- Determine how the operator determined the statistical sample size and margin-of-error for each of the four intended stakeholder audiences.

During annual program implementation audits, PAPA reviews the total number of stakeholders reached through each program mailing. The total number of stakeholders in each state and county are included in the mailing lists for each program. Mail lists are located in the program documentation. Postal forms can also be used as reference to determine overall stakeholder counts for each program for each year.

4.03 Measure Percentage Stakeholders Reached

- Document how the operator determined the statistical sample size and margin-of-error for each of the four intended stakeholder audiences.
- Document how the operator estimated the percentage of individuals or entities actually reached within each intended stakeholder audience group.

The percentage of stakeholders reached for each program is based on efforts to validate the accuracy and completeness of all stakeholder mail lists. Efforts to compare various list sources and validate the information are conducted at four year intervals. Data for selected sample areas is analyzed and the results are posted with the program documentation on the web site.

The percentage of stakeholders reached for the emergency responder audience is estimated to be nearly 100 percent. This is based on information taken from the Safety Source web site and in their directories. All of the agencies listed in their directories are contacted each year and the information is updated annually. The emergency responder mailing is sent first class, so any undeliverable mail is returned. Returns received within 45 days of the mailing are researched, and if the addresses can be corrected, the returned packets are then resent to the agencies. Reports of the processed returns are posted in the ER Follow-up documentation folder for that year.

The percentage of stakeholders reached for the excavators is estimated to be approximately 76% in areas that only use data from the commercial sources, 89% - in California, Nevada, and Arizona, 99% - in areas where complete one-call data has been

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incorporated. In depth evaluations was performed in 2022 in Broomfield County Colorado.

The percentage of stakeholders reached for the public official's stakeholders audiences is estimated to be 97 percent. This is based on the study conducted in 2021 using data from the 2020 mailing list and the US Census Bureau COG data. The previous study conducted in 2017 indicated the percentage of stakeholders reached was 75%. All reports and documentation is posted in the "General Documents, Surveys and Evaluations" folder.

4.04 Measure Understandability of Message Content

- Examine the operator's evaluation results and data to assess the percentage of the intended stakeholder audience that understood and retained the key information in each PAP message.
- Verify the operator assessed the percentage of the intended stakeholder audience that (1) understood and (2) retained the key information in each PAP message.
- Determine if the operator pre-tests materials.

Refer to PAPA survey reports from 2022 for information regarding efforts to measure understandability of messages and recall. Survey reports are posted in the documentation section.

<u>Information regarding pre-testing:</u>

PAPA program materials are pre-tested when they are initially developed or when significant changes have been made. Pre-test methods vary between programs and are outlined in the pre-test reports discussed below.

Materials for the Emergency Responder program were pretested in 2005 when the PERG was originally developed. The report is posted in the 2006 Emergency Responder program documentation folder located within the documentation section.

Materials for the Excavator program were pretested in 2006. The report is posted in the 2006 Excavator program documentation folder located within the documentation section. A readership survey has been conducted in 2013 and several years thereafter. The results were favorable regarding the existing content and no major revisions are anticipated.

The Public Officials Newsletter was pretested each year because the content changed from year to year. These reports are posted in the Public Official program documentation folders for each program year. After 2017, changes to the content are expected to be minor and pretesting is to be done on an as needed basis. If pretesting is performed in a program year, the reports will be posted in the Public Official program documentation folders.

4.05 Measure Desired Stakeholder Behavior

- Examine the operator's evaluation results and data to determine if the stakeholders have

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demonstrated the intended learned behaviors.

- Verify the operator determined whether appropriate prevention behaviors have been understood by the stakeholder audiences and if those behaviors are taking place or will take place when needed.

Refer to PAPA survey reports from 2022 for information regarding efforts to measure the likelihood of certain behaviors or to obtain information about the respondent's self-reported ability to react to certain events.

4.06 Measure Bottom-Line Results

- Examine the operator's process for measuring bottom-line results of its program.
- Verify the operator measured bottom-line results by tracking third-party incidents and consequences.
- Determine if the operator considered and attempted to measure other bottom-line measures, such as the affected public's perception of the safety of the operator's pipelines. If not, determine if the operator has provided justification in its program or procedural manual for not doing so.

Members are individually encouraged to collect information about the number of events where stakeholders did not act in a manner that is consistent with the direction provided in the safety messages and to provide information to PAPA when there are indications of a trend that should be addressed in future program materials.

4.07 Program Changes

- Examine the operator's program effectiveness evaluation findings.
- Identify if the operator has a plan or procedure that outlines what changes were made.
- Verify the operator identified and/or implemented improvements based on assessments and findings.

The program improvements made each year are included in the program outlines, which are posted in the program documentation section. The Annual Meeting Minutes and Program Review Documents are posted for each year. Rationale for program changes and improvements is included in the meeting minutes.