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# ADVANCED PIPELINE CONTROL ROOM MANAGEMENT

## *and* ADVANCED OPERATOR QUALIFICATIONS FOR PIPELINES

April 8-9, 2020

EUCI Conference Center

Plaza Tower One Conference Center

Denver, CO



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EUCI is authorized by IACET to offer 1.4 CEUs for the course

# OVERVIEW

The Pipeline and Hazardous Materials Safety Administration (PHMSA) published final regulations on December 3, 2009, for control room management (CRM). Otherwise known as the CRM Rule, these regulations prescribe extensive safety and operational requirements for controllers and control rooms that remotely monitor, and control liquid and gas pipelines regulated under 49 C.F.R. Parts 192 and 195

This course will move beyond reviewing the content of the CRM Rule and its initial implementation, and into the ongoing efforts required to continuously improve an operator's operational effectiveness and compliance status, while also maintaining adequate levels of preparedness in the event of a state or federal inspection.

Since the initial release of the CRM Rule, additional inspection protocols, frequently asked questions, and regulatory requirements have provided clarity towards intent, but have also added to the complexity of CRM implementation. Meanwhile, operators of liquid and gas pipelines have engaged their regulatory responsibilities under the CRM Rule, including developing, implementing, and documenting policies and procedures, training personnel, and responding to audit requests and enforcement actions.

At a basic level, this course will address the importance of the CRM Rule and its effect on the control room. However, it will also strive to go beyond the basic understanding of the initial release of the rule, and into the details of how operators are effectively, and sometimes ineffectively, responding to the said requirements. From the background and history of the CRM Rule, to the upcoming Gas Mega Rule, this course will help attendees to understand what is required of them, and what they can do to move past initial implementation, into continuous improvement of their CRM Programs.

# LEARNING OUTCOMES

Attendees shall develop an advanced appreciation for:

- What led to the creation of the CRM Rule
  - o Past incidents and regulatory gaps
  - o History of the rule making process
- The content of the CRM Rule
  - o Section by section approach
- What PHMSA expects
  - o Potential areas of focus
  - o Documentation
- How other operators approach CRM
  - o In class discussion
  - o Operator shares approach
- How to prepare for an audit
  - o Responsiveness
  - o Gap Analysis, CAPs, Training
  - o Follow up
- What to expect from PHMSA moving forward
  - o Mega Rule
  - o Areas of Focus
  - o Upcoming Inspection Initiative

# WHO SHOULD ATTEND

## Immediate

- Control Room Managers
- Lead Controllers
- Compliance Managers
- Additionally, personnel working for operators who have struggled with inspections in the past may benefit from the course material and the sharing of ideas within group conversations

## Secondary

- EHS Staff
- SCADA Staff
- Field/Facility Managers
- Engineers

# AGENDA

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WEDNESDAY, APRIL 8, 2020

**8:00 – 8:30 am**                      **Registration & Continental Breakfast**

**8:30 – 5:00 pm**                      **Course Timing**

**12:00 – 1:00 pm**                      **Group Luncheon**

**Background and History**

- Significant Pipeline Incidents and NTSB Recommendations
- The Rulemaking Process

**The CRM Rule**

- Cover Each Section of 49 CFR 192.631 and 49 CFR 195.446
  - o Letter of the law
  - o Notable FAQs
  - o Where other internal teams can help
  - o How to address Policy
  - o How to address Implementation

**Audit Preparation**

- Integrated Inspection Vs. Control Room Inspection
- Initial Questionnaire
- GAP Analysis
- Corrective Action Plan
- How do Different Roles Help in Audit Prep?
- How to Best Equip Controllers
- Document Availability

**Audit Experience**

- What to Expect
- Enforcement Action and Response
- Review Enforcement Examples

**What to Expect from PHMSA Moving Forward?**

- Gas Gathering Rule
- Upcoming Audit Initiative

**Available Resources**

**5:00 pm**                                      **End of Course**

## OVERVIEW

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All pipeline operators subject to Parts 192 and 195 are covered by the OQ rule and are responsible for ensuring that any employees, contractor employees, and subcontractor employees who perform covered tasks on their pipeline systems are qualified in accordance with the OQ rule.

Operators must develop and maintain a fully qualified, compliant workforce. In addition, master meters, government facilities, and housing authorities are required to develop an operator qualification program.

In this training we will discuss key factors when developing an OQ plan using the requirements of DOT 192 and the additional benefit of using ASME B-31Q. We will also look at state requirements versus federal requirements and past NOPVs (Notices of Probable Violations) to ensure a sound program for your company. We will examine new rules related to integrity management that could impact your task list and how to identify these tasks. As part of the continuous improvement of your program we will look at how to review your program, your methods of tracking management of change, and how you can show continual improvement. We will also discuss how to prepare for an audit.

Note: This course does not provide OQ certification for covered tasks. It is intended as a regulatory compliance overview for compliance managers and OQ program managers

## LEARNING OUTCOMES

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- Review Operator Qualification - Background and Overview
- Discuss History
- Gain an overview of the federal regulatory requirements of CFR 192
- Review of ASME B31Q and benefits of us
- Discuss developments in state OQ requirements
- Review of NOPVs (Notice of Probable Violations)
- Review rule changes and their possible impact to OQ Tasks
- Assess annual review process
- Discuss audit preparation

## WHO SHOULD ATTEND

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### Immediate

- In-house Counsel
- O&G executives & managers
- Pipeline project managers
- Safety managers
- Compliance managers
- Regulators and regulatory affairs personnel
- Engineers
- Risk-management consultants

### Secondary

- Housing Authorities
- Master Meter Accounts
- Government Facility operators
- Contractor Compliance Managers

# AGENDA

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THURSDAY, APRIL 9, 2020

**8:00 – 8:30 am**                    **Registration & Continental Breakfast**

**8:30 – 5:00 pm**                    **Course Timing**

**12:00 – 1:00 pm**                    **Group Luncheon**

## **Background and History**

### **The Details: Guidance on the Requirements**

- Operator Qualification Plan Requirements
- Employee OQ requirements
- Contractor OQ Requirements
- Span of control
- Identifying covered tasks
- Documents and procedures
- Recordkeeping
- Abnormal operating conditions
- Maintenance vs new construction
- Training
- Re-evaluation intervals and methods

**10:00 – 10:30 am**                    **Networking Break**

### **Changes Coming for OQ Impact**

- Impact of recent rule changes and the impact of covered tasks
- State requirements proposed and in effect

### **Annual Review of OQ program**

- Review of procedures
- Review of tasks list
- Review of processes
- Review of documentation

### **Review of NOPVs**

- Impact of these findings on our plan

### **Preparing for an Audit**

- Review of the inspection protocol
- Identifying risk

**2:30 – 3:00 pm**                    **Networking Break**

### **Preparing for an Audit (Continued)**

- Preparing participating staff
- Preparing management
- What departments to include in the inspection

**5:00 pm**                                **End of Course**

# INSTRUCTOR

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## Ross Adams

**Regulatory Manager, EnerSys Corporation**

Ross Adams is an experienced regulatory compliance consultant and client success advocate within the oil and gas industry. His career began in the offshore sector, assisting clients with conforming to the Bureau of Safety and Environmental Enforcement's 30 CFR 250.1902 Subpart S - Safety and Environmental Management Systems (SEMS) regulations. Grounded in the American Petroleum Institute's Recommended Practice 75, this regulation is a comprehensive approach towards a proactive compliance culture for the offshore industry. Mr. Adams worked to ensure that clients were compliant with applicable regulations in the context of Personnel Training, Facility Inspections, Hazardous Material Communication, Spill Response, and Mechanical Integrity.

In recent years, Mr. Adams' area of focus has shifted to the pipeline sector where he works side by side with operators to design, implement, manage, and continuously improve their compliance state as it pertains to 49 CFR 192.631 and 49 CFR 195.446, otherwise known as the Control Room Management (CRM) Rule. Mr. Adams has further demonstrated his knowledge of the CRM Rule via the design and execution of EnerSys' Compliance Facilitator Program, Audit Support Services. These programs work to ensure clients are audit-ready in advance of either federal or state CRM inspections.

Mr. Adams is an active member of the American Gas Association, Southern Gas Association, GPA Midstream, and the American Petroleum Institute. Mr. Adams is a graduate of Texas A&M University, holding a degree in Political Science.

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## ADVANCED OPERATOR QUALIFICATIONS FOR PIPELINES

April 9, 2020 | Denver, CO

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# INSTRUCTOR

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## David Landry

**Midstream Services, Industrial Training Services**

David joined the U.S. Airforce as an Aircraft Weapons Systems Specialist stationed in South Carolina. After returning from Desert Storm in 1991, Dave began his career in the pipeline industry with South Carolina Electric and Gas (SCE&G). While employed with SCE&G, he gained valuable operations and compliance experience working in technical support, OQ compliance, compliance supervision, sales, and marketing.

He moved to Carolina Gas Transmission, a Dominion Energy Company, in 2010 where he was responsible for the Operator Qualifications and Public Awareness compliance programs for the company. He also sat on the board of directors for South Carolina 811 for 8 years.

## INSTRUCTIONAL METHODS

PowerPoint presentations and case studies will be used in program.

## REQUIREMENTS FOR SUCCESSFUL COMPLETION

Participants must sign in/out each day and be in attendance for a minimum of four hours to be eligible for any continuing education credit.

## IACET CREDITS



EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

**EUCI is authorized by IACET to offer 0.7 CEUs for this course**

## EVENT LOCATION



### Plaza Tower One Conference Center

6400 S Fiddlers Green Cir. Greenwood Village, CO 80111

*The EUCI conference center is conveniently located adjacent to the Arapahoe at Village Center Light Rail Station, allowing easy access to and from DIA, Downtown, and Local Area Attractions. EUCI will validate parking at the Plaza Tower One Conference Center.*

## NEARBY HOTELS

*Each of these hotels offers a complimentary shuttle to and from the EUCI conference center.*

### Hyatt Regency Denver Tech (2.8 miles away)

7800 E. Tufts Ave. Denver, CO 80237

303-779-1234

### Special EUCI Room Rate: \$179.00 or lowest available rate

To access EUCI room rate visit

[denvertechcenter.regency.hyatt.com](http://denvertechcenter.regency.hyatt.com)

Click "Book Now", then click "Special Rates",

Click "Corporate or Group Code" and enter **CR102338**

You may also call central reservation at **1-800-233-1234** and give them the corporate code of **CR102338**

### Springhill Suites DTC (0.3 miles away)

7900 East Peakview Ave., Greenwood Village, CO 80111

303-721-3321

### Wingate by Wyndham (0.3 miles away)

8000 E. Peakview Ave., Greenwood Village, CO 80111

303-626-2641

### Hyatt Place DTC (2.1 miles away)

8300 E. Crescent Pkwy, Greenwood Village, CO 80111

303-804-7000

### Denver Marriott Tech Center (3.1 miles away)

4900 S. Syracuse St., Denver, CO 80237

303-779-1100

To Register Click Here, or

**Mail Directly To:**

PMA Conference Management  
PO Box 2303  
Falls Church VA 22042  
201 871 0474  
Fax 253 663 7224  
register@pmaconference.com

# EVENT LOCATION

**Plaza Tower One Conference Center**

6400 S Fiddlers Green Cir.  
Greenwood Village, CO 80111

*See nearby hotels on page 5*

**BUNDLE PRICE: ADVANCED PIPELINE CONTROL ROOM MANAGEMENT AND ADVANCED OPERATOR QUALIFICATIONS FOR PIPELINES COURSES**

APRIL 8-9, 2020: US \$1895  
EARLY BIRD on or before MARCH 20, 2020: US \$1695

**ADVANCED PIPELINE CONTROL ROOM MANAGEMENT COURSE ONLY**

APRIL 8, 2020: US \$995  
EARLY BIRD on or before MARCH 20, 2020: US \$895

**ADVANCED OPERATOR QUALIFICATIONS FOR PIPELINES COURSE ONLY**

APRIL 9, 2020: US \$995  
EARLY BIRD on or before MARCH 20, 2020: US \$895

## ENERGIZE WEEKLY

Energize Weekly is EUCI's free weekly newsletter, delivered to your inbox every Wednesday. We provide you with the latest industry news as well as in-depth analysis from our own team of experts. Subscribers also receive free downloadable presentations from our past events.

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**OR** Enclosed is a check for \$ \_\_\_\_\_ to cover \_\_\_\_\_ registrations.

**Substitutions & Cancellations**

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before March 27, 2020 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices

EUCI reserves the right to alter this program without prior notice.

