OPERATOR QUALIFICATION FOR PIPELINES: Designing an OQ Program to Meet PHMSA Requirements and Increase Safety Performance

October 29, 2018
Hyatt Regency Houston
Houston, TX

“CRM is an important, relevant topic to industry and the public. This material is timely and the opportunity to discuss it is important to our company.”

Control Centre Operations Coordinator, Interpipeline

EUCI is authorized by IACET to offer 0.8 CEUs for the course
OVERVIEW

In 2013, The U.S Pipeline and Hazardous Materials Safety Administration (PHMSA) proposed more than $9.7 million in civil penalties against pipeline operators who violate safety regulations. The figure is the highest yearly amount of proposed penalties in the agency’s history. PHMSA initiated 266 enforcement cases against pipeline operators for problems involving their integrity management programs, risk assessments, failure prevention and mitigation programs, and several other possible regulatory violations identified during failure investigations and routine inspections. Tougher enforcement is a result of PHMSA's internal improvements to its pipeline inspection and tracking procedures.

As enforcement tightens around all aspects of pipeline safety, a critical piece to operator compliance is a comprehensive Operator Qualification (OQ) program. PHMSA strongly enforces its OQ regulations and has developed enforcement guidelines and strategies. Thus, it is vital for operators to understand and be totally conversant on these rules and guidelines. OQ is essential to overall pipeline safety performance and is critical in preventing system failures, injuries, property damage, and other serious consequences.

OQ is not intended to be a one-time event, but a continual process. 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 rule. Operators must develop and maintain a fully qualified, compliant workforce. This one day course will provide guidance on all components of OQ regulations. PHMSA enforcement trends will be discussed. Attendees will leave the course with knowledge of the internal and external audit process and an interactive training session will be used to review the learning outcomes of this course. The instructor is a pipeline industry professional who has deep expertise in the requirements and day-to-day working experience with best-in-class programs.

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

LEARNING OUTCOMES

- Differentiate between federal regulations, state requirements, and the ASME B31Q task list for Operator Qualification (OQ) programs
- Review increasing scope of covered tasks
- Discuss intricacies and best practices of compliance documentation
- Discuss the recent PHMSA enforcement trends for OQ programs
- Demonstrate how to best prepare for OQ and operations and maintenance audit

WHO SHOULD ATTEND

This course is intended for professionals in the following areas:
- Attorneys and in-house counsel
- O&G executives and managers
- Pipeline project managers
- Safety managers
- Compliance managers
- Regulators and regulatory affairs personnel
- Engineers
- Risk-management consultants
- Energy consultants
AGENDA

MONDAY, OCTOBER 29, 2018

8:00 – 8:30 am  Registration and Continental Breakfast

8:30 am – 4:00 pm  Course Timing

12:00 – 1:00 pm  Group Luncheon

Development of the OQ Rules
- History
  - Qualification standards before the OQ rules went into effect
  - Development and promulgation of the OQ rules
- Overview of the federal regulatory requirements
- ASME B31Q Task List
- Developments in state OQ requirements

The Details: Guidance on the Requirements
- Qualifications
  - Employee OQ
  - Contractor qualification
  - Span of control
- Identifying covered tasks
- Documents and procedures
- Recordkeeping
- Abnormal operating conditions and emergencies
- Maintenance vs new construction
- Training
- Re-evaluation intervals

Special Considerations for Contractor OQ

Span of Control Recordkeeping Issues

Internal and External Audits
- Preparing for an audit
- Scope of OQ agency audits
- Recent audit results

What OQ Training Changes Are Needed

OQ Interactive Training and Review

“My understanding of OQ was greatly improved/enhanced.”

Corporate Auditor, Vectren

“Receiving training on OQ from highly experience professionals providing third party services offers a non-biased educational experience to enhance the knowledge base of industry professionals.”

HSE Representative II, Anadarko Petroleum Corp
COURSE INSTRUCTORS

Charlene B. Wright  
**Managing Member, Wright & Associates PLLC**

Ms. Wright advises clients on complex federal and state laws, agency regulations and industry standards including the Pipeline Safety Act, Federal Hazardous Materials Transportation law, Occupational Safety and Health Act, (OSHA) Toxic Substances Control Act, (TSCA), the PCB Mega Rule, LP Gas Code and NFPA Standards.

She represents clients in compliance, enforcement and permitting matters include those under the authority of the U.S. Pipeline and Hazardous Materials Safety Administration (PHMSA), Federal Energy Regulatory Commission (FERC), Bureau of Ocean Energy Management Regulation & Enforcement (BOEMRE), U.S. Environmental Protection Agency (EPA), Federal Motor Carrier Safety Administration (FMSCA), United States Coast Guard, (USCG), State and Local LP Gas Agencies, the Texas Railroad Commission, and Transport Canada. Her experience includes drafting comments to proposed rules impacting the industry and analysis of legislative initiatives.

Ms. Wright defends energy clients in litigation resulting from rupture, leak, fire and explosion in state and federal courts. She has handled litigation in California, Colorado, Illinois, Kansas, Michigan, Minnesota, Missouri, New Mexico, New Jersey, New York, North Carolina, Ohio, Oklahoma, Oregon, Utah, and Wisconsin.

Alex Monetti  
**Associate, Wright & Associates PLLC**

Alexander Monetti advises clients on federal and state environmental regulations, pipeline safety regulations and occupational health and safety laws impacting the oil and gas industry and the transportation of hazardous materials in North America.

Mr. Monetti conducts privileged environmental audits at pipeline facilities and assists with permitting applications and failure investigations. He assists clients with preparation for federal and state pipeline safety regulator audits.

“Provides valuable insight into current OQ training recommendations and PHMSA updates.”

Gas Control Manager, Atmos Energy

“Great class, very informative.”

Sr. PGD Operations Specialist, FPL/Nextera Energy
REQUIREMENTS FOR SUCCESSFUL COMPLETION OF PROGRAM

Participants must sign in/out each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

INSTRUCTIONAL METHODS

Case studies, PowerPoint presentations, and classroom exercises will be used in the instruction of this course.

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 0.8 CEUs for the course.

EVENT LOCATION

A room block has been reserved at the Hyatt Regency Houston, 1200 Louisiana St, Houston, TX 77002, for the nights of October 28-29, 2018. Room rates are $193 USD, plus applicable tax. Call 1-713-654-1234 for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is September 28, 2018 but as there are a limited number of rooms available at this rate, the room block may close sooner. Please make your reservations early.
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**PLEASE SELECT**

- **SPECIAL PRICE FOR BOTH** OPERATOR QUALIFICATION FOR PIPELINES AND ADVANCED PIPELINE CONTROL ROOM MANAGEMENT COURSES
  - OCTOBER 29-30, 2018: US $1895,
  - EARLY BIRD on or before OCTOBER 12, 2018: US $1695

- **OPERATOR QUALIFICATION FOR PIPELINES COURSE ONLY**
  - OCTOBER 29, 2018: US $995
  - EARLY BIRD on or before OCTOBER 12, 2018: US $895

**EVENT LOCATION**

EUCI’s Energize Weekly e-mail newsletter compiles and reports on the latest news and trends in the energy industry. Newsletter recipients also receive a different, complimentary course presentation every week on a relevant industry topic. The presentations are selected from a massive library of more than 1,000 current presentations that EUCI has gathered during its 30 years organizing courses.

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**HOW DID YOU HEAR ABOUT THIS EVENT? (DIRECT E-MAIL, COLLEAGUE, SPEAKER(S), ETC.)**

**PRINT NAME**

**COMPANY**

**WHAT NAME DO YOU PREFER ON YOUR NAME BADGE?**

**ADDRESS**

**CITY**

**STATE/PROVINCE**

**ZIP/POSTAL CODE**

**COUNTRY**

**PHONE**

**EMAIL**

**LIST ANY DIETARY OR ACCESSIBILITY NEEDS HERE**

**CREDIT CARD INFORMATION**

**NAME ON CARD**

**ACCOUNT NUMBER**

**EXP. DATE**

**SECURITY CODE (LAST 3 DIGITS ON THE BACK OF VISA AND MC OR 4 DIGITS ON FRONT OF AMEX)**

**BILLING ADDRESS**

**BILLING CITY**

**BILLING STATE**

**BILLING ZIP CODE/PSTAL CODE**

**CREDIT CARD INFORMATION**

**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 September 28, 2018 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 at 303-770-8800. EUCI reserves the right to alter this program without prior notice.
ADVANCED PIPELINE CONTROL
ROOM MANAGEMENT: Lessons Learned, Enforcement Trends, Metrics and Guidance

October 30, 2018
Hyatt Regency Houston
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RELATED EVENT:
OPERATOR QUALIFICATION FOR PIPELINES
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OVERVIEW

The Pipeline and Hazardous Materials Safety Administration (PHMSA) published final regulations on December 3, 2009, for control room management (CRM). The regulations prescribe extensive safety 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.

Owners and operators of liquid and gas pipelines have significant and ongoing regulatory responsibilities under the CRM Rule, including developing, implementing and documenting policies and procedures, training personnel, and incorporating CRM requirements into operations across pipeline systems. Although called Control Room Management, regulations have broad implications to the operation and maintenance of pipeline systems. Recent CRM Inspections by PHMSA resulted in significant findings of deficiencies and enforcement. This Advanced Pipeline Control Room Management course will review the regulation and specific issues with implementation. Attendees will be instructed on how to reach the next level of continual improvement with their CRM plan, development of meaningful metrics, and ensuring ongoing implementation of the plan. PHMSA audit findings and trends will be shared and discussed.

Note: This course is not designed to provide OQ certification for controllers. It is designed for control room managers, in-house counsel and compliance managers.

LEARNING OUTCOMES

- Review knowledge of control room management (CRM) regulations
- Review the CRM audit process
- Discuss techniques and tips for identifying and addressing deficiencies in your CRM plan or CRM implementation
- Identify how to best prepare for CRM audit interview
- Discuss the role of compliance managers and in-house counsel in managing audits in achieving and demonstrating compliance
- Discuss controlling and protecting company records while demonstrating compliance

WHO SHOULD ATTEND

Those with a basic understanding of CRM rules who want to achieve the next level of continual improvement, prepare for audit, or get updates on audit findings and trends, including, but not limited to:

- In–house counsel
- Compliance managers, supervisors, and coordinators
- Control room managers and operators
- In-house and compliance auditors

“Very informative class.”
Sr. PGD Operations Specialist, FPL/Nextera Energy

“CRM course provided insight to key principles within the rule. CRM course provided opportunity to engage with others in the industry.”
US Gas Operations, TransCanada
AGENDA
TUESDAY, OCTOBER 30, 2018

8:00 – 8:30 am  Registration and Continental Breakfast

8:30 am – 5:00 pm  Course Timing

12:00 – 1:15 pm  Group Luncheon

CRM Background & Overview
- NTSB Study and recommendations
- Rulemaking
- Advisory bulletins
- Applicability and exclusions
- Regulations vs. best practices

Required Documents & Procedures
- Normal and abnormal operating conditions and emergencies

Adequate Information
- Display standard
- Point to point verification
- Communication and training: test and verify
- Backup
- SCADA systems
- Shift change and hand-over

Fatigue Mitigation & Managing Hours of Service Requirements
- HOS rules and emergency deviations
- Workload analysis
- Fatigue mitigation strategies and documentation issues
- Incident/near miss investigation
- Research and best practices
- Metrics and performance measurement

Alarm Management
- Defining “safety related” alarms
- Developing and validating alarm philosophy
- Managing and correcting alarm set points
- Alarm bundling and overload
- Benchmarking and performance metrics
- Addressing deficiencies
- Managing pipelines and multiple SCADA systems
- Documentation or periodic, monthly and annual requirements

Change Management
- Understanding the rule and how it applies beyond the control room
- Engaging stakeholders

New CRM Regulations
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“Great class for starters on CRM compliance.”
Supervisor  
Gas Control & Planning, Cheniere Energy

“The courses that I participated in over the past 2 days have been a solid investment of my time and money. The thorough discussions with a confident, knowledgeable instructor will help me do my job more effectively and share information with my team with confidence.”

Compliance Manager, Douglas Pipeline
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