API RP 1185 is a flexible and scalable framework, but what does that mean? Let's look at:

Planning Methods of Engagement

Being intentional about engagement starts with your planning. Once that is completed, it is easier to select methods. You may narrow your selection further by looking at the business value they deliver and if they are within budget.

Through planning, you'll better understand your stakeholders, including who they are, the level of engagement, and any barriers to engagement. Then, you can select appropriate methods. The same method may be used more than once. In addition, engagement with the same stakeholder group/individual may vary over time. For example, consultation may be more prevalent during a project compared to operations where information may be accepted.

Engagement methods correlate with the level of engagement, which is directly connected to what makes sense for your organization. Being honest, sharing, and honoring the level of engagement is critical to building trust. It is disingenuous if a company communicates that they are consulting yet ignores the information from the consultation.

Once the method is selected, it needs to be shared. In choosing communication methods, consider the stakeholders you are reaching. For example, your communication with seniors may differ from the method you use with youth. In some instances, you may communicate the same message in several ways. For example, for an open house, you may share details about the open house on the radio, on a poster, on your website, on social media, etc.

The RP lists several engagement methods ranging from posters to facilitated meetings. With the methods in the RP, benefits, challenges, and additional information are outlined. There are also several ideas to communicate.

Shall: As used in a standard, "shall" denotes a minimum requirement in order to conform to the standard.

Should: As used in a standard, "should" denotes a recommendation or that which is advised but not required in order to conform to the standard.

6.4.2 Methods of Engagement

Operators shall consider a variety of ways to engage with groups of stakeholders. Specific methods of engagement can include:

- Gatherings
- Direct communication
- Site visits
- One-on-one meetings
- Facilitated meetings
- Public Docket comments

6.4.3 Communication Tools

Communication tools support methods of engagement, including two-way engagement.

So far, we have been talking about the operator reaching out to the identified stakeholders. Let's also look at how interested people/stakeholders can seek information. Ideas include.

- A website
- A dedicated email address
- A dedicated phone number
- An interactive map

Source: Map - Enbridge Inc. (https://www.enbridge.com/map#map:infrastructure)

Documentation is important in an engagement program. The information for this guidance brief is the same as the information for planning considerations.

At a minimum, document your key process steps for planning and preparing stakeholder engagement. Considerations include:

- Identifying staff and the type/level of training and resources needed.
- Outlining how confirmed stakeholders' information is used for each phase of the pipeline lifecycle.
- Recording and resolving feedback (a feedback loop).
- Methods for connecting with identified stakeholders and for stakeholders who do not respond to initial attempts.
- Providing methods for stakeholders to self-identify themselves and their preferred connection methods.
- Tracking of existing confirmed contacts, affiliations, interests, rights, etc.;

At times throughout the pipeline life cycle, there may be situations where operations may appear irregular or not normal. It might be helpful to:

- Define and document what is meant by irregular, not normal, or atypical for your organization.
- Trend the data in your documented feedback mechanism to help define what is irregular.
- Review the outcomes in the above bullets to identify opportunities to plan and engage proactively.

> **6.7 Minimum Program Documents**
>
> Operators <u>shall</u> maintain the following:
>
> - Key process steps for planning and preparing engagement with stakeholders.
> - A description of how the operator will engage with stakeholders during the stages of a pipeline life cycle.