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

Pertinent Information

Reviewing this implementation guidance brief with the guidance on the 'full range of stakeholders' is recommended.

In the guidance for the 'full range of stakeholders', there was a focus on identifying stakeholder groups and going deeper to ensure consideration of all stakeholder groups.
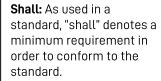
This implementation guidance brief looks at key contacts derived from pertinent information.

- Using tactics like newspapers and posters, making information available and encouraging interested stakeholders to sign up for information.
- Research the internet for churches or other places of worship.
- Similarly, consider website reviews and cold calling to determine key contacts with local environmental groups.
- For Tribal Nations, contact the historical office or a local friendship center.
- Participating in economic development or service organizations can be an opportunity to meet with local leaders. Lean on the local leaders to expand your network.
- In identifying key contacts in disadvantaged communities, consider researching applicable non-profits like food banks, youth groups, etc. The executive directors should be able to provide guidance.
- Connect with the local emergency planning communities.
- Follow the lead of the Federal permitting agencies in learning key contacts.
- Ask elected federal, state and/or municipal officials for contact names/information of individuals of potentially interested stakeholder groups.

- If your organization is new to the area, working with a local consultant to determine key contacts may be helpful.

It is important to recognize that stakeholders are typically there for the asset's lifecycle unless they move. Consider a centralized system (database, spreadsheet, etc.) or an overview of how multiple systems are connected and to be used. As noted in the 'range of stakeholders', there is a process to refresh lists of known and newly identified stakeholders.

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.

5.3.3 Pertinent Information

In identifying stakeholders, the operator shall seek to identify key contacts.

The operator shall have a process for refreshing lists of known stakeholders and identifying new stakeholders as the pipeline moves from one life-cycle stage to another (for example, from completion of pipeline installation to testing), with hand-over to personnel responsible for operations and maintenance, and as applicable for integrity management.

It will be important, though, to indicate the frequency of the process. Each operator will determine the frequency based on business priorities and resources allotted. The frequency will likely vary with the lifecycle of the asset. For example, updates may be more frequent during a project than during operations.

Documentation is important in an engagement program. Minimum program documents to support the responsibilities in this area include:

- A documented process that identifies, understands, and confirms potential stakeholders.
- A way to store information about stakeholders. In addition to the logistical information, consider storing detailed information such as their interests. It may be helpful to store how you learned they are a stakeholder. Was it, for example, through the public awareness program, Chamber of Commerce, a daycare, etc?
  - o Some organizations may opt for an in-house database or spreadsheet.
  - o Customer Relationship Management (CRM) software may guide what and how to store information.
- A process on how to enter information about new stakeholders and touchpoints with existing stakeholders into the chosen storage methodology.
  - o Perhaps information can be entered in real-time using technology like tablets (iPads).
- A process that indicates the review frequency and maintenance of your stakeholder storage system to maintain quality.
- A process to identify and assign read or write access.
- The above-mentioned processes could be grouped into a larger process document or a sub-program.

> **5.4 Minimum Program Documents**
>
> Operators <u>shall</u> maintain several documents for monitoring (section 9.3) and evaluating (section 9.4) their engagement programs.
>
> - Description of the process used.
> - How information is stored and maintained.
> - Process for refreshing lists.
> - Policy and procedures for maintaining information shared by stakeholders.

Aside: For organizations following RP 1173 Pipeline Safety Management Systems*, review element 10 on Documentation and Record Keeping to ensure the control of documents and records of the above information adequately meets API 1173.*