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Best Practices for Managing High-Profile/High-Risk Assets

Presented by: Tom Hall, VP of Business Development, KorTerra





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The Stakes Are High

- Protection of high-pressure mains/high profile assets has never been more important and challenging
- Oil & Gas organizations have the highest risk and both the states and federal agencies such as PHMSA are increasing scrutiny and fines
- Seeing shift in the market where telecoms are now focusing on this more with high value/high impact Fiber lines



Infrastructure Bill: The Pressure is Growing

- \$1.2 Trillion bill passed in July 2021
- \$700 billion in reauthorization of previous funding levels
- \$500 billion more than ever before!
- Around \$550 billion in new federal investments in America's roads, bridges, water infrastructure, resilience, internet, etc.
- Rollout of these funds to occur over the next 5 years (2022-2026)
- Protection of high-pressure mains/high profile assets has never been more important and challenging

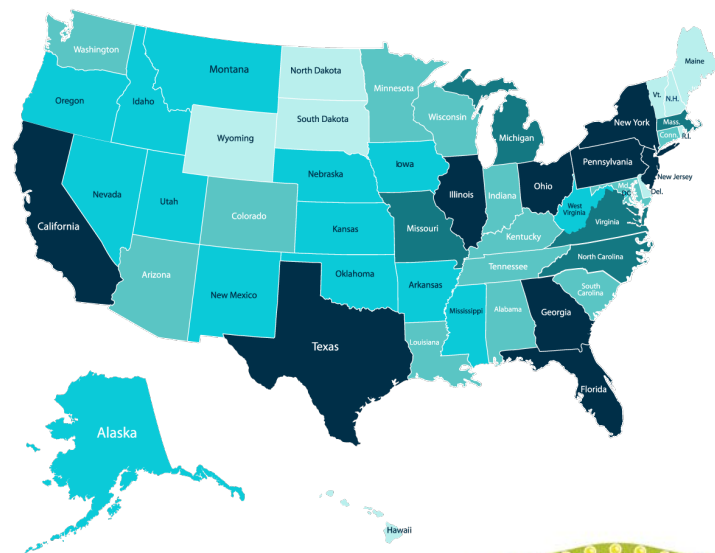


The Task Ahead

Infrastructure Bill State Funding Allocation

- Program overview with timing details and links to apply: <https://www.whitehouse.gov/wp-content/uploads/2022/01/BIL-Factsheet-Local-Competitive-Funding.pdf>
- Awarded projects: <https://www.transportation.gov/buildamerica/financing/infra-grants/infra-formerly-fastlane-grants-awarded>
- How to apply for funding: <https://www.transportation.gov/buildamerica/financing/infra-grants/how-apply>
- There's been a belief that a lot of this funding is already in motion, that really isn't the case. Estimates we have heard from our customers it 5%-10% has hit the market at this point. Expect to see a major acceleration of this over the next 3 years as the funds will need to be spent.

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Damage Prevention Impact

- Increased 811 volume resulting from acceleration of:
 - Fiber projects
 - Major road rebuilding
 - New rail lines
 - Underground water infrastructure
 - More
- Work for one vertical, will create work for all verticals – utilities, oil & gas, telecom, municipalities, contract locators
- Get to know the work that is going to be funded through the bill in the areas you work or serve



Strong Processes are Key

Key questions to be able to answer:

- When a new ticket arrives that is involving a high-pressure asset, how quickly do I know this?
- What types of alerting is available to allow me to immediately identify that action is required?
- How are communications managed internally and externally related to this ticket?
- What type of unique documentation am I doing for these tickets to demonstrate to senior management and regulators of compliance in this area?



Technology Can Be Leveraged to Drive Automation & Reduce Risk

- Automation is critical to reduce the potential for human error or delays in the process
- Leverage technology tools to help drive alerts and notifications
- Use GIS data and software to drive intelligent alerting and notification workflows to ensure the right staff is deployed to support watch and protect efforts

The screenshot displays a GIS application interface with several panels. At the top, there are input fields for 'Tag Name' (containing '!! Critical Infrastructure !!') and 'Tag Description' (containing 'Dig box encroaches on CI'). Below this, there are tabs for 'Values', 'Map', and 'Notifications'. The 'Values' panel shows an 'Export List' with 'Showing 1 to 1 of 1 entries'. The 'Map' panel shows a map of St. Cloud, MN, with a red polygon highlighting a specific area. The 'Notifications' panel shows a table with two entries, each with a 'Schedule' column and an 'Email' column.

Notification Schedule	Notification Template	Email	Email Excavator
<input type="checkbox"/> 24/7	Tag Email - Default Email For Tags	CRITICALINFRASTRUCTURE@IMPORANTFIBERCOMPANY.COM	No
<input type="checkbox"/> 24/7	Tag Email - Default Email For Tags	EXCAVATOR	Yes

At the bottom of the interface, there are buttons for 'Save' and 'Cancel'.



Documentation Should be Consistent & Electronically Captured – Watch & Protect/Encroachments

- Documentation of all critical pieces of information is captured and stored electronically
- Capture additional pieces of information beyond the ticket being marked for high profile assets
- Electronic capture of this information makes it searchable and ensures it can be easily referenced when regulators are conducting audits

Encroachment Form

Location of Encroachment

Description *

Longitude From *

Longitude To *

Latitude From *

Latitude To *

Property Owner of Encroachment Party

First Name *

Company *

Email *

Last Name *

Cell Phone *

Comments

Stand By and Watch Section

Atmos Asset? * Yes No

Encroachment Date *

Line damaged during excavation? * Yes No

Type of asset *

Site excavated? * Yes No

Buried sensing line? * Yes No

Details

Further Action Needed? * Yes No

Activity Suspended? * Yes No

SBAW Needed? * Yes No

High Consequence Area? * Yes No

Moderate Consequence Area? * Yes No

Excavation Information

Reason For Excavation *

ROW Condition *

Crossing Atmos Pipeline with: *

Land Use *

Direction of Encroachment *

Surface Cover *

Diameter of Steel Facility Pipe Crossing Atmos Pipe *

Clearance(inches) *

VAC ONLY: How many marker balls were placed? *

VAC ONLY: How many test stations were placed? *



Communication is Key To Ensure Stakeholders Are Informed & Reduce Risk

- Communication is critical to ensuring all stakeholders understand the risk profile of the site
- Leverage multiple forms of communication and precise communication to ensure that excavators and 3rd party locators can't misunderstand what they are faced with at a particular locate/dig
- Certain states have mandated positive response to the excavator, but even if they haven't, take a high touch, multi-channel communication approach for high profile assets (E-mails with detail, plus calls and texts)

From: <support@korterra.com>
Sent on: Tuesday, October 17, 2023 12:52:28 PM
To: Matt Hill <matt.hill@korterra.com>
Subject: Ticket for PNMAB - Status Change

Our records indicate you called in dig request at 7761 CANDELARIA RD NE, ALBUQUERQUE, NM.

This email is a status update relating to ticket number for code PNMAB.

Ticket:
Member Code: PNMAB
Company: CHRIST LUTHERAN CHURCH
Done For: CHRIST LUTHERAN CHURCH
Work to begin on: 2/25/2015 3:50:00 PM
County: BERNALILLO
City: ALBUQUERQUE
Address: 7761 CANDELARIA RD NE
Contact: GENE POSTENRIEDER
Phone: (505)269-1086
Completed on: 2/24/2015 3:15:02 PM
Response: NO RESPONSE PROVIDED

Facility	Work Performed	Action Code
PIPELINE	Marked	HIGH PROFILE

Remarks:

Notes:

Spoke with homeowner, they will contact us again prior to excavating so we can be on-site to monitor crew.



Audits are Critical of High-Profile Assets to Ensure Best Practices Are Being Followed

- Implement processes for ensuring that best practices related to high profile sites are being audited
- Audits should provide opportunities for coaching/process improvement with key internal and external stakeholders involved in the protection of these assets
- Document audits electronically to provide ease of reference for regulators/senior management
- Leverage technology to trigger audits in scenarios where risk is the greatest

Facility: GAS What is the status of the audited ticket? *
 Marked Cleared Not Complete Action Code: STANDBYWATCH - HIGH PROF

Audit Status: Fail Points: 2

Yes No Was locate completed by due date? *

Yes No Do markings follow proper utility marking standards, state law, and Atmos marking requirements? *

Improper use of marks or stripes
 Improper or non-existent labels
 Poor spacing of marks
 No flag use when necessary
 Improper/non-existent marks for abandoned facility
 Improper or no use of offsets when appropriate
 Did not use approved marking materials
 Did not extend markings, if practical, at least one additional mark beyond the dig area boundaries

Yes No Was the proper close code used? *

Yes No Did the technician follow ticket marking instructions? *

Yes No Did the technician locate and mark all company facilities within the requested dig boundary area? *

Yes No Did the technician follow Atmos procedures? *

Yes No Did the technician accurately mark involved facilities? *

Yes No Did the technician include appropriate documentation? *

Comments:



Not All Tickets/Locates Are Created Equal: Unlocatables/Turnbacks Require a Different Approach

- Not all tickets can be easily managed/located
- Unlocatables is a consistent and growing challenge for many organizations
- Documenting this and improving the situation for the future is critical
- In situations where different locating approaches are needed to be taken or vacuum excavation is required, document this to make the process easier the next time
- Marker balls are used by many organizations to improve their ability to locate the next time a ticket comes in for that area

The screenshot shows a web-based form for managing a ticket. At the top, there are fields for 'Member Code: ASW', 'Type: ATMOS1', and 'Positive Response:'. Below this, the 'Facility: GAS' is listed, along with 'Work Performed' options: 'Marked', 'Cleared', and 'Not Complete'. An 'Action Code' dropdown is set to 'TURNBACK - COMPLETE'. The form is divided into sections: 'Locate Information' with a question 'Is there a vacuum excavation?' and 'No' selected; 'Unlocatable Form' with a 'Details' section containing 'Reason unlocatable', 'How was the facility located', and 'Facility Involved'; an 'Action Taken' section with 'Permanent repairs made?' and 'Marker post(s) installed?'; and a bottom section with 'Is there an encroachment?' and two 'VAC ONLY' questions about marker balls and test stations, both with '0' selected. At the bottom, there are 'Internal Remarks' and 'External Remarks' text boxes.



Summary

- Macro market conditions such as the infusion of work due to the Infrastructure Bill is making it more challenging for organizations to ensure the protection of high-profile assets
- Protection of high-pressure mains/high profile assets has never been more important and challenging
- Best practices for protecting high profile assets starts with having **well documented processes that are understood by all members of your team** and the 3rd parties who support your damage prevention efforts
- **Leverage technology to help drive automation and alerting** when tickets involving high profile assets show up
- **Documentation consistency is critical and electronically capturing this information** makes life easier as it relates to regulatory audits and management reporting
- **Communication with all stakeholders is key, and take a multi-channel approach** leveraging detailed e-mails, phone calls, and texts for high profile assets
- Implement a process to ensure **audits are conducting regularly for high-profile sites to ensure best practices are being followed and documented** appropriately



Q&A



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