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

Monitoring, Evaluation, and Adjusting

For operators with a management system, this part of the RP will flow quite naturally as it aligns with the check and act of the plan-do-check-act cycle. Suppose you don't have a formal management system. In that case, your organization likely measures how well it met its objectives at the end of the year, which is part of performance management. Either way, monitoring, evaluating and adjusting your engagement program follows the same principles.

Developing your process upfront for **monitoring** allows you to be more aware during the program's execution. The RP's list of minimum program documents listed in Table 1 could be used as a guide. With each one, each operator may want to create a list of tasks, which could be moved into a checklist where completion dates are recorded. This will look very different from one operator to the next.

Next, the program **evaluation** may use a combination of qualitative and quantitative measures. This will vary for each operator, as each operator selects measures with supporting rationale for its program. Although this is for the program, measuring specific techniques as they happen may be beneficial to the operator to learn whether a technique was effective.

There are many ways to evaluate programs (or techniques), including:

- Surveys
- Polling
- Analyzing media comments
- Focus groups
- Learn from external stakeholders directly involved

Companies may want to self-assess or use an internal auditor if they have one.

Companies with a feedback mechanism in place may want to review/mine the information as a way to measure the program.

Collaborative methods where multiple companies are being measured may provide helpful information.

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.

9.3 Monitoring

The operator shall have a process for monitoring the execution of processes developed for each of the elements in this RP.

9.4 Evaluation

The operator shall evaluate its engagement program to determine its effectiveness showing connection to a "Plan, Do, Check, and Act/Adjust" process.

The operator should involve stakeholders in its evaluation process, seeking feedback on its engagement activities.

Those measures should be shared publicly as part of the program.

9.5 Adjusting

The operator shall have a process adjusting its engagement program to improve its effectiveness.

There are a variety of ways to evaluate your program to determine the program's effectiveness.

Throughout the program, consider jotting down improvement ideas as they are thought of. Make jotting ideas in a notebook or digital notepad easy and informal. It can be an effective tool to look at when adjusting your program either formally at the end of the cycle or periodically throughout.

Through program evaluation, you'll learn what worked well and where improvements could be made. Acting on the information and **adjusting** the program comes next. A process that guides program improvement enables timeliness in improving the program, primarily through the information learned during monitoring and evaluation. It may be helpful to have a 'History of Changes' section near the end of the program document that shows how the program has evolved.

Improvements are often grouped into editorial changes and material changes. Notable material changes and areas of success may be worth sharing with other operators. These lessons learned, and leading practices help the industry improve overall.

Industry associations could play a role in facilitating sharing among operators and reporting publicly on the industry. Industry associations could also collect and share key performance indicators/measures and report these more broadly.

Documentation is important in an engagement program.

At a minimum, documenting your processes for monitoring, evaluation and adjusting is needed for understanding and repeatability. Operators will want to document their improvements. Operators will also want to document how stakeholders were included in their program review and how performance and lessons learned are shared with other operators and the public.

9.5 continued

Operators should rely primarily upon findings from monitoring and evaluating to adjust the program.

The operator should consider sharing lessons learned and leading practices with peer operators.

Pipeline industry associations should consider promoting sharing of operators' lessons learned.

9.6 Minimum Program Documents

Operators shall maintain the following:

- listing of improvements in use within the elements and the overall program showing a connection to a "Plan, Do, Check, and Act/Adjust" process;
- description of ways an operator includes stakeholders in the review of their engagement program performance;
- description of how engagement performance and lessons learned are shared with other operators and the public.