

# 2018 – 2020 Enform Strategic Plan

Three Year Service Plan\*

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\* Submission of Enform’s Strategic Plan in fulfillment of the “Three Year Service Plan” requirement for the Industry Funding Application.

## Mission

Enform is the upstream oil and gas industry's advocate and leading resource for the continuous improvement of safety performance. Our mission is to help companies achieve their safety goals by providing practices, assessment, training, support, metrics and communication.

## Vision

No work-related incidents or injuries in the Canadian upstream oil and gas industry.

## Enform Strategic Areas

### Key Area A: Data Based Decisions to Drive Performance

#### Capabilities:

- Rigorous data collection, robust analysis and continuous improvement
- Assessment framework and tools
- Data access, gathering from multiple sources, analytics and synthesis to identify trends and derive meaning
- Safety Centre of Excellence – Safety expertise and knowledge transfer

#### Initiatives:

- Plan the development of a centralized repository of data for report generation
  - Define the parameters for collecting, organizing, storing, accessing and sharing new databases
  - Automate internal reporting processes
- Acquire new leading and lagging data sources
  - Identify stakeholders and plan initial conversations with producers to gain access to leading data
  - Gain access to identified lagging data that enhances the quality of ongoing reporting
- Document existing and new processes in support of the assessment framework
  - Maximize efficiencies by analyzing and mapping data and analytics management processes (eliminate duplication of effort, enhance data security, reduce errors and minimize loss of reputation)
- Plan and design a model for the Safety Centre of Excellence

- Start conversations with stakeholders to determine key data and information that bring value to internal and industry stakeholders
- Goal is to develop safety data expertise and follow best practices for transferring knowledge and insights to internal and industry stakeholders

**Measurement:**

- Create a plan for the development of a centralized data warehouse is developed
- Consolidate enrollment data into the financial data warehouse Design the industry engagement plan, and start conversations with stakeholders, to acquire leading indicators (e.g. Near miss, Hazard ID, Root-cause)
- Acquire lagging indicators (i.e. Statistics Canada tables)
- Document existing processes and preliminary new processes in support of the assessment framework
- Plan and design a model for the Safety Centre of Excellence
- Build and implement a Safety Centre of Excellence

**Key Area B: Agreed Standardization****Capabilities:**

- Facilitation of collaboration across stakeholders
- Influence to put right people on development and decision-making teams
- Process management to drive collaboration and decision-making
- Industry Accepted Standards & Practices - facilitation process

**Initiatives:**

- Seek Board approval for the Terms of Reference, the Selection Matrix, accountability and decision-making process (stage gate process including input from stakeholders), the structure and the governance of the Senior Operating Officers Standards Council (or Advisory Committee).
- Recruit senior operating officers to serve on the Council with the assistance of the Board's network of member companies. Determine the critical mass for the council as expressed through total capital spending by the selected companies as a percentage of the total capital spending for the entire Canadian industry. For example, the member companies account for more than 90% of the total industry expenditures.
- Identify and promote first priorities (low hanging fruit) to be addressed as new standards by the Council which may include – Life Saving Rules, Industry Recommended Practices, Common Safety Orientation, Common Safety Registry (based on COR).

**Measurement:**

- Senior Operating Officers Standards Council approved by the Board, and formed
- Life Savings Rules approved and adopted for implementation on January 1, 2018, with a phase in period for companies with cost and timing issues related to adoption
- Members of the Council adopt the Life Saving Rules for their companies and require service providers to adopt them
- Design a Common Safety Registry
- Members of the Council influence their peers to adopt the standards
- Adoption of standards is audited and results are reported

**Key Area C: Workers Ready to Work Safely****Capabilities:**

- Effective and efficient learning management and delivery
- Delivery of fit for purpose programs
- Enable mobility across sites
- Worker identification and verification

**Initiatives:**

- Use of best suited course delivery models to meet student needs [in-class, online, blended]
  - Consider the level of mastery required once student completes a course. Example: It takes very little interaction to teach someone how to recognize 'FALL PROTECTION EQUIPMENT', however, it takes considerably more interaction to help someone choose and use that equipment.
  - General rule of thumb: Student retention of a skill or knowledge is more successful when a practical exercise is completed with instructor guidance, an interactive exercise is completed online or a face to face discussion happens in a group environment
- Develop administrative processes to access and utilize student evaluation data
  - Enform designs course content through industry engagement and defines learning objectives based on that content. In order to appropriately assess our learner outcomes, we need thoughtful testing measurement as well as direct student feedback.
  - Students are Enform's customer. Their opinion and classroom experience is critical information Enform needs gathered through evaluation feedback to better understand its customer needs.

- Perform research and develop project plan for “Common Safety Orientation” acceptable to all industry stakeholders
  - Each company has evolved over time to develop their own specific orientations to meet their needs. Before the industry can move to a “Common Safety Orientation”, we must understand the similarities and differences of those critical orientation topics across companies, and incorporate those into a common orientation.
- Work with IT and Certifications to identify viable options to current state for worker identification and verification
  - Due to the diverse geographical workforce Enform certifies, it is critical we find secure, convenient ways to help employers access and verify certifications of a very mobile workforce.
- Build and test a guide tool for competency, starting with the H2S Alive course. This is the starting point for onsite competency assessment work.
  - Employers often struggle with determining a way to check competency of staff members taking courses. Using a competency form and a competency guide tool designed specific to course objectives will provide employers with a starting point to create a task-specific assessment fit for their work.

**Measurement:**

- Plan regarding some existing courses to be converted or modified to include partial or whole online delivery
- Completion of a trending report validating student feedback from Enform’s courses in Calgary
- Completion of a gap analysis of existing employer general orientations, and recommendation of a scope of content for “Common Safety Orientation”
- Schedule a review of progress to date on various options for worker identification and verification, and create a status report of options
- Perform research and create a competency tool of the H2S Alive course, for employer use

## Key Area D: Employers Encouraged and Supported to Improve Safety Performance

### Capabilities:

- Advice, framework, tools and processes to increase safety management capability
- Safety system assessment and registry accreditation through Certificate of Recognition (COR)
- Safety culture interventions, awareness and support tools

### Initiatives:

- Secure internal resources for account managers and assign an account manager for each sector, to establish relationships
  - Account Manager roles have been assigned as follows:
    - CAPP/EPAC - Michael Mass
    - CAGC/CEPA - Lisa Polio ( Maternity leave to be filled in June)
    - PSAC - Robert Waterhouse
    - CAODC - to be filled
  - Schedule regular and ongoing touchpoints to establish relationship
  - Attend Trade Association H&S meetings and any other applicable meetings to gain insight into Trade Associations needs
  - Account Managers to become knowledgeable in regulatory updates or legislative changes for their assigned sector
- Support companies at all points in their safety performance development
  - Continue work on Process Safety and Safety Culture
  - Continue to develop guidelines, IRP's, and develop and distribute packages for Safety tool box talks
  - Identify companies that benefit the most from an Industry Support visit
  - Continue to share learnings in the form of Safety Alerts, as they are provided to us from our customers
  - Provide Speaker Series throughout the year on topics that are current and relevant in the industry
- COR – Revision of audit standards (~2 years)
  - The AB Government revised the audit standards and have given certifying partners until January 1, 2019 to implement the changes.
  - Safety Audits & Certifications (SA&C) has developed and are launching a two-year project plan to make the revisions, receive governing body approval, revise the software tool and train auditors and employers

### Measurement:

- Build relationships with trade associations and industry
- Fill account manager roles and determine responsibilities & outcomes

- Revision of COR audit standards (2-years' time); project completed on budget and on time (2019)
- Completed targets and analysis of key safety performance indicators (Number of companies visited, number of tools and resources utilized, number of requests, delivery on time/budget, and outstanding requests);
- Overall upward trend in improved safety performance of companies visited, as evaluated over three-year period
- Decrease in time to achieve a COR

## Key Area E: Enform has a Positive and Recognized External Brand

### Capabilities:

- Ongoing, regular communication to build the visibility of Enform's brand
- Marketing and public relations activities with visible, integrated industry-wide presence and focus on workers
- Event and conference planning to facilitate safety networking and speaker opportunities

### Initiatives:

- Heighten Enform's profile by leveraging stakeholder relationships through associations and organizations
  - Facilitate regular information sharing meetings with association communication representatives to stay abreast of key issues and alignment of messaging
  - Explore cross promotional opportunities and two-way information sharing
  - Develop and disseminate branded communications materials to support partners (training providers, auditors, account managers) in becoming brand ambassadors
- Implement communication strategies to educate and engage younger workers
  - Conduct a reputation all survey and Frontline readership survey to target content aimed at addressing worker interests and needs
  - Implement new social media strategy to engage young workers
  - Seek opportunities and support the development of online safety toolkit resources
  - Develop advertising campaign to increase awareness of training and resource offerings
- Develop marketable and timely event themes that engage the industry in meaningful discussions about safety issues
  - Develop or refresh sponsorship plans for all Enform hosted events
  - Acute awareness of emerging trends and issues and actively seek relevant and engaging speakers

**Measurement:**

- Increase in media inquiries
- Increase in speaking invitations
- Increase in awareness (survey) – positive perception
- Increase in web activity, downloads and subscriptions
- Increase in testimonials and willingness to participate in initiatives (Future State)

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Greg Stringham, Chairman, Board of Directors, Enform

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Date



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