

International Association of Drilling Contractors



HSE&T Committee Meeting
 18 February 2025
 IADC Office: 3657 Briarpark Drive, Suite 200
 Houston Tx 77042
 Zoom option available

Attendance

V = Virtual attendance, IP = In-Person attendance
In-Person Sign-in sheet [attached](#).

HSE&T In-Person Attendees					
Name	Company	A	Name	Company	A
Micah Backlund	H&P	IP	Mike Truitt	ICD	IP
Brooke Polk	IADC	IP	Ryan Smallwood	Patterson	IP
Dave Demski	C&E, LLC	IP	Jason Adams	Ensign	IP
Ryan Wood	Patterson	IP	Russel Holmes	API COS	IP
Marcelo Azeredo	Transocean	IP	Grant Doran	OPITO	IP
Gricelda Chavez	Precision Drilling	IP	Cody Ashley	Latshaw Drilling	IP
Clint Perry	Valaris	IP	Jason Jensen	Ensign	IP
Alma Roberts	IADC	IP	Ricky Banks	IADC	IP
Bill Krull	IADC	IP	Kristin Ward	IADC	IP
Stephanie Rodriguez	IADC	IP	Thad Dunham	IADC	IP
Bob Warren	IADC	IP	Jim Rocco	IADC	IP
HSE&T Zoom Attendees					
Name	Company	A	Name	Company	A
Erika Rocha	Citadel Drilling Ltd	V	Wes McCloy	Akita Drilling	V
Richard Grayson	Nabors	V	Jarand Hindenes	International SOS	V
Scott Simpson	Chevron	V	David Polansky	Exxon	V
Juan Pablo Arias	Training Consultors	V	Abdelhak Saidi		
Zuhair Ahmed	Sharif Petroleum Operating Company	V			

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Agenda

<p>9:00 – 9:05</p>	<p>Welcome & Introductions <i>Micah Backlund, H&P</i></p>
<p>9:05 – 9:17</p>	<p>IADC Antitrust Policy <i>Brooke Polk, IADC</i></p> <p>Safety Moment</p> <ul style="list-style-type: none"> • An instructor was using pyro-tech in training, assuming it was a dummy, but it was live and the instructor suffered from burns. Be sure to always check before use. • Two fatal events with a total of three fatalities over the last two weeks. <ul style="list-style-type: none"> • New hand to the company, but not new to industry, was working on a centrifuge without it being isolated. Ultimately, their clothing got wrapped up in the centrifuge. Be sure to lock out equipment before working on them. • 3 people crossed over marked barrier to perform maintenance on a series of pumps and there was pressure released on a frac-pad; catastrophic failure, high pressure pipe. One died on location, one lost his arm and was transported to the hospital and ultimately died at the hospital.
<p>9:17 – 9:47</p>	<p>IADC 2024 ISP Data Review and Discussion <i>Micah Backlund, H&P</i></p> <ul style="list-style-type: none"> • Improvement in KPI trends • Compare or what are you seeing from 2023-2024 <ul style="list-style-type: none"> • BK: Trend 3 years ago = 17 fatalities, 2 years ago = 10 fatalities, last year = 8 fatalities • MB: HOP Space – What is working for you and listen to what they say • Rig developed own action plans • Trying to get away from paperwork (admin) work for Rig Managers – need to be out and seen by hands not behind desk doing unnecessary admin work • Review all the “shall” in Rig Manager guide to see how to make it manageable so they can • SS: Marked improvement last year from 1H to 2H 50% reduction in incidents • CA: Have you investigated success the same way you would an incident/failure? • SS: We have but not enough. Learning Team to look at why it was successful – seems other stuff gets in the way. • MT: Bring in to preempt to see where the gaps are • MB: Personnel/Resources prevent this need to look at the bad right now • RB: HOP course – offshore reaction vs land. The minute something goes wrong HOP is out the door and revert back to old ways • MT: We have to reel them back in – human nature • CA: Handled by middle management • MB: Lack of discipline and reaction from clients to maintain the discipline • MB: What do you think 2025 will look like? • MT: Stability challenged in positive ways new people come in and shifting people • GC: Learning Team to visit locations with new people to let them know its ok to ask questions. Coaches for locations trying to make more personnel • MB: Remain engaged with industry including those already mentioned. If committed to make a difference within industry engage with and come to the meetings <p>ACTION ITEM: Have a meeting between EWTC/IADC/OSA to discuss best practices.</p>

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<p>9:47 – 10:20</p>	<p>IADC ISP Database Demo and Feature Discussion <i>Ricky Banks, IADC & Bill Krull, IADC</i></p> <ul style="list-style-type: none"> • Gave demonstration of the ISP database using an inactive company. • New feature was added. ‘Day of the week’ and ‘SIF/SIFp with an open text box’ feature • MB: When did it launch? • BK: System went live 20 January 2024. 22 years’ worth of data was pulled into the system. • MB: What format can data be exported? • RB: Excel • BK: Can also be as a PDF • RS: What % is reporting? • BK: 82% of drilling worldwide. 6 Drilling Contractors members that aren’t; 2 of those 6 have come on. Some regions (Brazil) are excited about the reports. • MB: What’s next for ISP? • BK: Keep a list of suggestions from reporters and will look for funding for additional changes once there are more suggestions. • RH: Near miss? Drops? Why not come together and work with other agencies like COS?
<p>10:20 – 10:30</p>	<p>BREAK</p>
<p>10:30– 10:58</p>	<p>Competence Assurance Management Trends and Best Practices <i>Dave Demski, IADC Competence Assurance Auditor</i> The presentation is attached below.</p> <ul style="list-style-type: none"> • 4 areas of recommendation <ul style="list-style-type: none"> • Add ‘implemented’ requirement • Clarify 5 requirements • Remove 10 requirements • Update the CAA Guideline documents • Possible additional requirement – document gaps identified (e.g., employee fails but no current requirement to document the gaps) • 31 currently accredited companies under the IADC CAA program • Most are willing to share ‘Best Practices’ <ul style="list-style-type: none"> • Ideas on how to share <ul style="list-style-type: none"> • Remote online sessions • Workshops at next year’s HSET Conference • Article in Drilling Contractor • MT: Is this only for offshore? • DD: No, both onshore, offshore, and service companies
<p>10:58-11:26</p>	<p>Workgroup Updates</p> <ul style="list-style-type: none"> • SIF SC Update – <i>Dan Lundstrom, Western Energy Services & Micah Backlund, H&P</i> • IADC Accreditation Update– <i>Brooke Polk, IADC</i> • IADC Onshore Update– <i>Thad Dunham, IADC</i> • IADC Offshore Update– <i>Jim Rocco, IADC</i> <p><u>SIF SC Update</u></p> <ul style="list-style-type: none"> • MB: A lot of conversation on how do we integrate F&PI versus SIF. OSA under API has formally adopted the F&PI definition. Asking if IADC will adopt; we have already voted NOT to adopt.

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ACTION ITEM: Come back to table and identify what our formal position will be on SIF vs F&PI. Request for Volunteers – if interested in participating, please email Brooke Polk.

- TD: Would be great to have a recommendation from group to present at the NAOAP (North American Onshore Advisory Panel) meeting on May 14th

IADC Accreditation Update

- Update from Mike Dubose
 - HSE Case Guideline document for land rigs has been posted to the IADC homepage for comments and suggested edits until 21 February 2025.
- Safety Alert Project
 - Development began June of 2024
 - Demo in April for workgroup – please reach out to Brooke Polk if interested in being added to this workgroup
 - Go live June of 2025
- Finalizing contract for updates to KREW (Knowledge Retention and Education for our Workforce); continuous learning library for well control
 - Hybrid Learning Platform for well control if you utilize the continuous learning platform throughout your 2-year certification cycle and you meet all of those courses and you pass the assessments in your 2 year period you're eligible for this hybrid learning course.
 - It's about a 2 to 3 day course that you can demonstrate on day one that you already can pass the assessment, you have the knowledge, and it's going to focus more on critical aspects of well control, more scenario based training, more simulation The more human performance elements, so it's not revisiting the same content. It's, how do we take our people to that next level? Because they've proven in the KREW system that they've continued to maintain, and they have the retention of those base level well-controlled concepts.
 - If interested in participating, please email Brooke Polk. Workgroup will begin working with our developers, starting in March
- Updates to the Well Servicing curriculums will go live 31 March 2025.
- Review of CAA requirements and guidelines will begin in March – please reach out to Brooke Polk if interested in being added to this workgroup

IADC Onshore Update

- SEC Climate Rule – dead on arrival; will not defend in court
- OSHA Heat Rule – not official but will also probably be shot down
- May 15th Onshore Conference
- April 7-9 DC Fly-in
- March 25-26 Geothermal conference in Vienna
- Driller's Pac raised over \$50K in 2024; goal is \$75K for 2025
- March 28th Clay Shoot

IADC Offshore Update

- IMO Ship Design & Construction Session 11 (SDC 11):
 - IADC's participation in the Industrial Personnel Code working group convened at the IMO's SDC 11 meeting in January. While this code largely doesn't directly apply to personnel employed onboard MODUs, IADC is interested to stay current and provide consultation on matters involving offshore operations. At this session, the potential for implementation of additional guidance on the code's application was discussed. However, the working group concluded that additional time was necessary to gain industry experience on further applicability of the code prior to inserting guidance that would provide broader and more explicit instruction on the code use. This issue will likely be revisited at a later date.
- U.S. Coast Guard Cybersecurity Rule:

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	<ul style="list-style-type: none"> • In January 2025, the Coast Guard published its final rule on Cybersecurity provisions applied to vessels and certain marine transport and facility operations. As finalized, this rule does not apply to foreign flagged vessels, including MODUs. However, drilling contractors should be aware of certain cybersecurity provisions being included in certain contractual/bridging documents that may be expected to underpin safety management strategies as cybersecurity due diligence underpins safety management elements. • National Ocean & Atmospheric Administration: <ul style="list-style-type: none"> • The IADC is remaining engaged with other upstream trade organizations and stakeholders to progress the effort of resolving the question of the “Biological Opinion” question. In Q4 2024, The National Marine Fisheries Service (NMFS) was compelled by certain environmental group lead litigation to repeal its Biological Opinion (BiOp) on offshore development impacts on the marine environment. In doing so, the Bureau of Ocean Energy Management’s (BOEM) permitting process for operators will be potentially interrupted come May of 2025 should NMFS not be able to reissue a new BiOp that accounts for perceived deficiencies. IADC continues to engage with other trades to work towards a resolution of this issue. A resolution is anticipated in Q2 of 2025. • Safer Seas Act: <ul style="list-style-type: none"> • The statute codified in 46 USC 4901 is what’s known as the Safer Seas Act or SASH (Sexual Assault, Sexual Harassment). IADC has been engaged to obtain clarification of the applicability of this statute as there is a fundamental question as to whether this provision applies to foreign flagged vessels. The Coast Guard asserts that it does apply. However, no mention of foreign flagged or “non-U.S. vessels” is made in the statute or Coast Guard policy letter. IADC is currently in discussion with the Congressional Coast Guard & Marine Transportation Subcommittee to obtain insight on the intent of this provision and whether the subcommittee’s explicit intent was for applicability to certain foreign vessels, including foreign flagged MODUs. IADC is awaiting clarification feedback from the subcommittee. • Well Control/MPD Developments <ul style="list-style-type: none"> • In December, IADC met with representatives from the Chinese National Petroleum Company (CNPC) to learn more about its intention to develop an ISO Standard for Managed Pressure Drilling. Currently no such standard exists since the upstream industry has not yet acquired recognized consensus on the question of what constitutes well control vs. MPD. The CNPC group interested to develop this instrument would likely be moving forward with technical content that assumes an answer for the well control-MPD question. IADC is quite interested to see this work for any work to proceed with a general consensus of global drilling SMEs. As consensus on this issue has not yet been identified, IADC is interested to have the CNPC group share its work with IADC to better understand how this work might assist with deriving consensus on the question at hand. This CNPC group will be performing a presentation of its work to the IADC UBO/MPD Committee the week of 24 February. Upon receipt of this presentation, the committee will be able to assess presented content that can further inform how the question of well control and MPD may be progressed. Further work on this effort may be continued once the committee has had the opportunity to further consider the information presented.
<p>11:26-11:30</p>	<p>AOB FUTURE HSE&T COMMITTEE MEETING DATES:</p> <ul style="list-style-type: none"> • 14 May 2025 • 13 August 2025 • 12 November 2025 <p>RB: Challenge everybody here to go back ‘home’ and advocate for participation in the HSE&T Committee.</p>
<p>11:30</p>	<p>ADJOURNMENT</p>

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HSE&T Committee Meeting

18 February 2025

9:00am – 11:30am

IADC Office

Sign in Sheet

Name	Company	E-mail address
Russell Holmes	API cos	holmesr@api.org
JASON ADAMS	ENSIGN	jason.adams@ensignenergy.com
MIKE TRUITT	ICD	mtrutt@icdrilling.com
BILL KRULL	IADC	bill.krull@iadc.org
GRANT DORAN	OPITO	grant.doran@opito.com
Brooke Polk	IADC	brooke.polk@iadc.org
Yncilda Chavez	Precision Drilling	ychavez@precisiondrilling.com
Alma Roberts	IADC	alma.roberts@iadc.org
Cody Ashley	Latshaw Drilling	cashley@latshawdrilling.com
Ricky Banks	IADC	Ricky.Banks@IADC.org
Jason Jensen	Ensign	jason.jensen@ensignenergy.com
Clint Perry	Valaris	clint.perry@valaris.com
RYAN SMALLWOOD	PTEH	ryan.smallwood@ptenergy.com
RYAN WOOD	PTEN	RYAN.WOOD@ptenergy.com
Dave Demski	CE, LLC	davedemski1947@gmail.com
Micah Backlund	H&P	Micah.Backlund@HP2DC.COM
Stephanie Rodriguez	IADC	Stephanie.Rodriguez@iadc.org
Bob Warren	IADC	Bob.Warren@iadc.org
Thad Dunham	IADC	Thad.Dunham@iadc.org
Kristin Ward	IADC	Kristin.Ward@iadc.org

Competency Assurance Accreditation Program

Trends and Best Practices

Authors:

Mark Denkowski, Competency Assurance Auditor

Dave Demski, Competency Assurance Auditor

Jorge Leuro, past Competency Assurance Auditor

Presentation Objectives

- Review recent trends, best practices & challenges faced by the 31 IADC Accredited Competency Assurance Programs
- Provide draft recommendations for:
 1. Revisions to the accreditation criteria
 2. Additions to guidelines for accredited programs
 3. Recommended best practices
 4. Practices to consider

Evolution of the IADC's Competency Assurance Accreditation (CAA) Program

2009 Accreditation Program initiated

2010 Deepwater Horizon

2012-14 IADC Developed a Competency/KSA Database for industry use

2015 Competency Assurance Guidelines Published (Best Practices for a Successful Program), Jorge Leuro Editor

2017 CAA Program Benchmarking Initiated – to identify evolving practices (12 Programs)

2018 Accreditation Criteria Upgraded to reflect more stringent criteria

2018 Accreditation Criteria Upgrade

(Implementation not required until 2020)

Added new accreditation requirements that we saw were implemented in mature & successful CAP programs:

- Time window in which a newly hired promoted employee must begin assessments
- Time by when an employee must be deemed competent after being hired or promoted
- Define how will competency gaps be closed

2023 – 24 Benchmarking Methodology

1. Gathered detailed program information from the 2023 – 2024 audits of the 31 accredited programs
2. Detailed review to identify:
 - Evolving trends
 - Best practices
 - Challenges to improve effectiveness and efficiency

Drilling Contractors

- Borr Drilling
- ChampionX Middle East Services
- Deep Well Services
- Diamond Offshore Drilling
- Dolphin Drilling
- Gulf Drilling
- KCA Deutag Drilling
- Mideast Integrated Drilling
- National Drilling
- Noble Corporation
- Noble Drilling A/S
- Odfjell Technology
- Parker Wellbore
- Saudi Aramco Nabors Drilling
- Sea and Land Drilling
- Shelf Drilling
- Valaris

Service Companies

- Abraj Energy Services
- Al Baraka Oilfield Services
- Alshawamikh Oilfield Services
- Baker Hughes
- Ba Omar Oilfield Services
- Cansco International
- Diversified Well Logging
- Ensign Energy Services
- GET Consultants
- Halliburton
- Hilong Oil Service and Engineering
- NOV
- Tetra Technologies

Accreditation Criteria Revisions

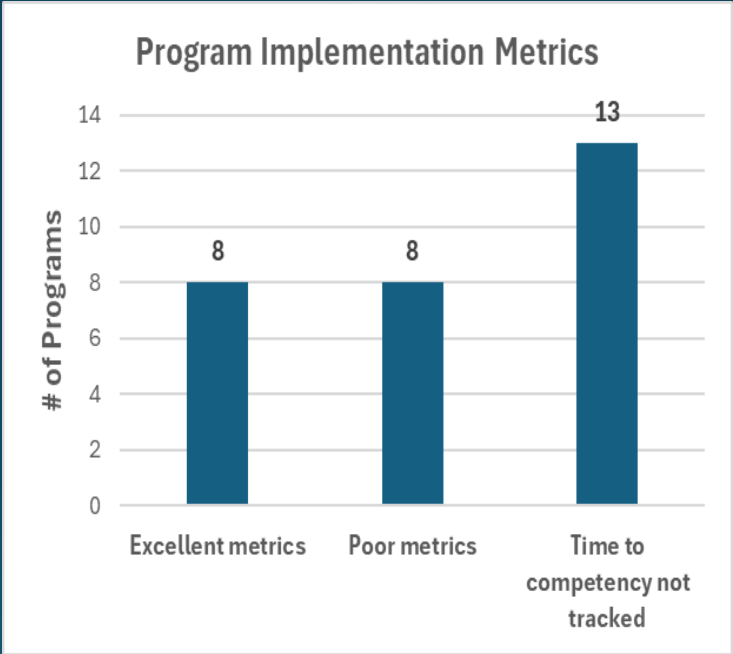
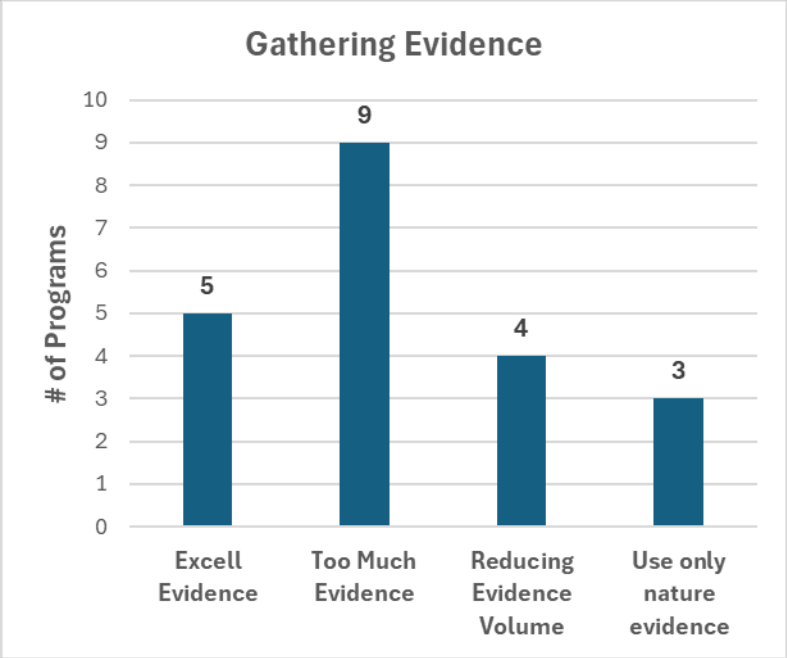
- Add 1 additional requirement, to specifically define the degree to which a program must be “implemented” before it can apply for accreditation
- Reword & Clarify 5 requirements, due to companies not understanding the intent of the criteria
- Remove 10 requirements that are a) duplications of other criteria or b) are too granular

Guidelines for Successful Programs

- **Update the “2015 Competency Assurance – Guidelines for Building a Successful Program” on 7 topics**
- **Purpose**
 - Clarify the intent of the accreditation criteria
 - Provide guidance on effective and efficient practices
- **Examples:**
 - Evidence required to prove an employee is competent
 - Program metrics to monitor implantation and utilization
 - Assessment verification

Examples of Needed Guidelines

Accreditation Criteria
Guidelines
Best Practices
Practices to Consider



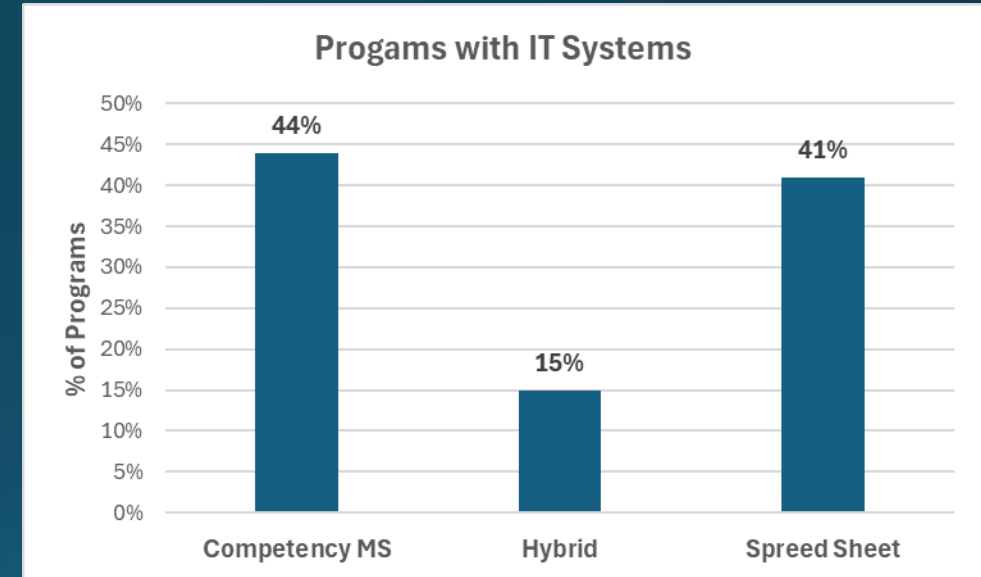
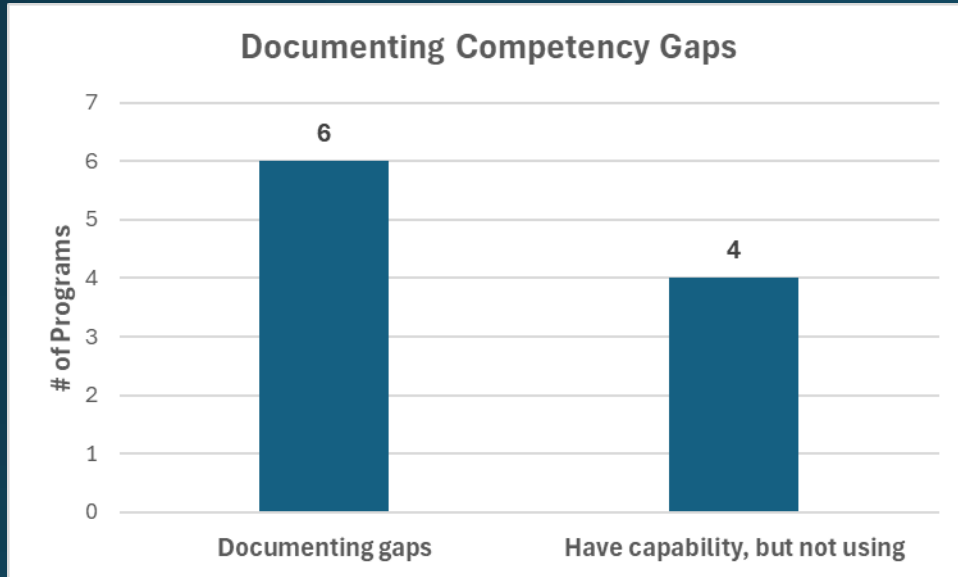
Other needed guidelines

- Reassessment of long-term employees
- Well written competencies
- How to determine program effectiveness
- Audit process

Best Practices

- **Best Practices**, methods to implement a program that significantly increase its effectiveness and efficiency
- **Purpose**, to provide examples of how other programs are addressing challenges in program design and operation
- **Examples:**
 - Documenting competency gaps
 - Use of a Competency Management System

Best Practices Examples



Other best Practices

- The use of baseline assessments (3)
- Corporate analysis of organization wide competency gaps (3)

Practices to Consider

- **Practices to Consider**, practices used by some companies to address a specific need. These may not apply to all programs
- **Purpose**, to share practices that address specific needs other programs may have but are not aware of
- **Examples:**
 - Use of proficiency scales vs. binary rating (7)
 - Competency assessments in the hiring process (6)
 - Utilizing knowledge testing to minimize assessor workload (5)
 - Designing programs as "Career Development Programs" (6)
- **Other Examples**
 - Requirements for promotion (5)
 - Program metrics on corporate score card (6)
 - Documenting how gaps are closed (4)
 - Designation of "critical competencies" (4)
 - Reassessment of long-term employees (7)
 - Use of internal assessors not assigned to the rig (4)

Additional Things to Consider

- **Validation of these Recommendations**
- **How to share**
 - Remote online Sessions
 - Workshop at next Years HSET Conference
 - Article in Drilling Magazine
 - IADC direct communication
- **Level of sharing** between Accredited Programs and the wider industry

Questions

and

Discussion

**Draft Suggested Upgrades to the IADC
Competency Assurance Program Accreditation Process**

February 16,2025

(Mark Denkowski, Dave Demski and Jorge Leuro)

Purpose of this Document

This document summarizes the changes that the authors recommend be made to the IADC's Competency Assurance Accreditation Program. These recommendations are the outcome of a detailed review of the latest audits (primarily from 2023 – 2024) of all the accredited programs. All these audits were conducted by one of the authors of this document. These recommendations apply to the 1) accreditation process, 2) the accreditation requirements and 3) upgrades to the *2015 Competency Assurance Guidelines manual*. These recommendations are divided into four specific areas.

- Accreditation requirements – These recommendations relate to the requirement for accreditation and the process of reviewing initial applications for accreditation.
- Guidelines – These recommendations relate to enhancements we suggest making in the Competency Assurance Guideline document (2015). *Note these guidelines are provided only in outline form in this document and will need to be defined in more detail for inclusion in the Guideline document.*
- Best practices - These best practices we believe should be communicated to all of the accredited programs. These are not additional accreditation requirements but rather best practice examples of how to design and implement some of the accreditation requirements. *Note these practices are provided only in outline form in this document, and will need to be defined in more detail for communication to the accredited companies.*
- Practices to consider – These practices for programs to consider, are not best practices that apply to all programs, but only how some companies are addressing specific needs of their programs that might be useful to other programs. *Note these practices are provided only in outline form in this document, and will need to be defined in more detail for communication to the accredited companies*

These recommendations provide supporting documentation for a presentation on these suggestions was presented to the IADC's HSET Committee, on February 18, 2025. As noted in that presentation we believe it would be very beneficial to the industry to provide new ways of sharing best practices on Competency Assurance Programs. The authors of this report are willing to work with the IADC to provide more detail on the items outlined above.

Accreditation Requirements - Suggested Changes to the Competency Assurance Accreditation “Handbook” and Accreditation Requirements.

The most critical change that should be made to the accreditation requirements and the CAA applications process is to better define what is meant by “implementation.” Jorge has experienced two companies that he was told to audit that did not have their programs at all implemented. Dave has experienced three instances of this occurring. Four of these instances have occurred in the last 3 years. Allowing this to continue reduces the value of attaining the IADC accreditation and is a waste of time for the Technical Review, the auditor and the company that must pay for a premature audit.

We suggest the following be included in the “Technical Review” process and the initial application for accreditation and also be added to the Competency Assurance Accreditation handbook.

1. The program has been fully communicated to all employees who will be subject to the accredited region, division etc.
2. Assessments have been conducted on 50 % of the personnel that will ultimately be subject to the program and that a plan is submitted to assess the remaining personnel within 1 year.
3. Gaps have been identified during the initial assessment and methods are in place to close those gaps.
4. A procedure and metrics to track the implementation of the program has been defined and is operational.
5. At least one internal audit of the program has been conducted.
6. All current assessors have passed the qualification requirements you have defined.
7. All current verifiers have passed the qualification requirements you have defined, and you have evidence that the verification procedure is operational.

These changes or something like it would require that the CAP Accreditation handbook be updated to reflect these changes and the changes outlined below for the accreditation criteria.

There are currently 48 accreditation criteria (on the Audit Report form) that a company must meet to become accredited. We believe five of the existing criteria should be re-worded or clarified (in both the Accreditation Manual and the Audit report form) and twelve need to be removed as they add no value or are repetitive.

Reword or Clarify:

2.2.1.3 Requires that a company confirm that “all of the competencies for an employee’s position or role are included in the program.”

Why this need clarification: This statement can be problematic for some companies (especially service companies) that train personnel to fill a certain position but depending on the regional location or the operators they are working for, only deploy a certain number of products or services, but not all that might be deployed globally for that level positions. So, you can have a job position that in

theory can perform 100 different services globally, therefore at the corporate level all 100 are aligned with that job position. But at the local level they may only provide 50 of these services. This criteria should be reworded to say, “all competencies that an employee is expected to perform in the near term.”

2.3.2.1 A written statement expressing commitment, expectations, and responsibilities of upper management is submitted.

Why this needs clarification: A written statement in and of itself really means nothing. Rather this question should be generalized with something along the lines of “You have a written procedure that demonstrates specific ways in which your upper management demonstrates their commitment and expectations regarding support of the CAP to the rest of the organization.”

2.3.3.3 This requirement states that a “SOP is written for the management of change.”

Why this needs clarification: Mark feels this is not adequate and there must be a specific SOP for the CAP.

2.5.1.3 This requirement states that a written procedure must be in place to “describe the expected timeframes for employees to achieve a defined level of competence.”

Why this needs clarification: Some organizations (especially service companies) have employees who do not need to be deemed competent in some services or tools within a given timeframe, because they may never be asked to provide these services in their career.

2.5.9.1 This requirement states that a “written procedure describes the assessment verification process.”

Why this needs clarification: What is meant by “verification” is very unclear. Many companies have interpreted this to mean that all the assessment documentation forms are filled out correctly, so they have administrative personnel checking this. The most effective means of verification we have seen is that the next management level up from the assessor reviews the assessments and signs off that they believe this is a valid assessment of the employee based on what they know about the employee. This is much more valuable than an “administrative verification.”

Remove:

2.3.1.2 “**An organization chart** with a description of the responsibilities of each position involved in managing or administering the program is submitted.”

Rational to remove: 1) This is already covered in item 2.3.1.1 that asks for a detailed list of responsibilities for personnel supporting the program and 2) organization charts never include a description of responsibilities in the chart and in and of itself adds no value.

2.3.2.2 “**Competencies represent the tasks** performed by employees within those systems.”

Rationale to remove: 1) Systems based programs are already covered in Section 2.2.1.1 and 2) we have no idea what this is asking for that has not been already covered.

2.3.5.1 “A Quality Control/Assurance procedure is written that **defines the job title and qualifications of the person responsible for managing quality assurance.**”

Rational to remove: 1) are we going to dispute the job title and qualifications of the individuals what a company selects to do their audits? I don’t think so.

2.3.5.3 “A quality **Control/Assurance procedure** is written for the **maintenance and control of records**”

Rational to remove: 1) it is unclear what records this is referring to (it appears to be audit records) and 2) all companies essentially have this procedure covered through their auditing system procedures, so there is no value added in having this identified separately and 3) in relation to competency programs the more important issues are they conducting internal audits.

2.3.5.5 “**A Quality Control/Assurance procedure** is written for **management of the verification process.**”

Rational to remove: 1) why is this specifically identified in the audit process versus all the other and sometimes more important processes? Remove this from the audit process and add in what the key processes that audit should address.

2.4.1 “**Educational aids and equipment** utilized were indicated in **the application**”

Rational to remove: 1) what does something in the application have to do with the audit of the **program** and 2) we do not believe this adds value.

2.5.2.3 through 2.5.2.6 **These four accreditation criteria** ask if specific procedures for assessor and verifiers were communicated and implemented.

Rational to remove: 1) These are wasted questions and 2) that could be asked about every procedure in the program, why distinguish these two

2.5.2.7 “**Assessors and verifiers are either** an employee of the oil and gas company or employed by a third party that is contracted to perform this role”

Rational to remove: 1) we are not sure what this criteria adds and 2) it is almost a mute question because 3rd party assessors and verifiers are rarely used and 3) the more important question is “what are the qualifications for assessors and verifiers” which is already covered.

2.7.1 “Requested Exceptions and Variations: A written procedure that describes the assessment verification process”

Rational to remove: 1) why is this specific issue singled out for exceptions and variations, 2) this in theory could be applied to all of the accreditation criteria.

Guidelines - These recommendations relate to enhancements we suggest making in the Competency Assurance Guideline document (2015).

Below is an outline of evolving best practices from successful programs that outline how they implement requirements of the program. This content should be added to the 2015 Competency Assurance Guideline document.

- Evidence requirements to prove competency – Nine programs are putting excessive requirements on their employees and assessors to provide copies of documents that they feel helps prove that an employee is competent. This practice stems from early CAPs implemented in the UK. Most companies are moving away from this practice and instead ensuring that assessors provide short but valid comments on each competency assessed.
- Overall program metrics – Only 8 programs have strong metrics to track the overall implementation and utilization of their programs. These metrics are vital to the overall health of the program. Guidelines in this area will significantly improve the overall effectiveness and efficiency of all programs.
- Assessment Verification – There is a strong trend among many companies to change how they verify the quality of assessments. Five years ago, essentially all programs were providing only “administrative” verification of competency assessments. This is basically addressing only if the assessment documents were filled out correctly. Six of the accredited companies are utilizing rig or location-based leaders to verify the quality of assessments. This trend is slowly accelerating but better guidelines would be very helpful so to note was needless time doing only administrative verifications.
- Reassessment of long-term employees – The practice reassessing employees who have been in the same job position for extended periods of time (3-5 years) is to reassess them only on a subset of the overall competencies for the position. This provides targeted reassessments and minimizes wasted time reassessing competencies. Six companies have identified various targeted ways to do this effectively.
- Evaluation of program effectiveness – Programs are struggling to meet this requirement, but several companies have come up with innovative and effective ways to do this which would benefit all programs.
- How to structure & write competencies – Approximately half of the programs have poorly written and structured competencies and as a result many programs have begun the process of re-writing them. Guidelines here would be very helpful.
- Improvements to the audit process – Half of the programs have poorly structured audit process to monitor the quality of the overall program. Guidelines here would help improve the effectiveness, quality and efficiency of all programs.

Best practices - These best practices we believe should be communicated to all the accredited programs.

Below is a list of best practices on how to address some of the accreditation requirements.

- Documentation of competency gaps – Ten of the programs have the ability in the procedure to document when an employee fails to be deemed competent. Six of the programs are utilizing this capability and the other four are not. The use of this practice provides strong proof that a program is in fact working as designed. This provides the additional capability to analyze cross organization gaps that might indicate a need for additional training or improved procedures. Three of the programs are analyzing these gaps across the organization and this has proved extremely valuable.
- Use of Competency Management Systems – 44% of the programs are utilizing a Competency Management System (CMS). The majority of these are internally developed systems. 15 % are using a hybrid system while 41% are still only using spreadsheets to monitor assessments and overall program status. The use of a CMS allows direct documentation of assessments online at the rig or service location and significantly reduces assessor workload and overall program efficiency. Guidelines on how to utilize a CMS to do perform specific tasks will be very valuable to programs that are and are not using a CMS.
- Use of baseline assessments – Three companies are using baseline assessments to initially assess their employees. This involves a quick assessment of all of the competencies for an employee's position and can then focus follow-up efforts on addressing the competencies with gaps. This practice can significantly increase the effectiveness and efficiency of the assessment and employee development process.
- Corporate analysis of competency gaps – As noted in the item at the top of this listing, analyzing cross organization gaps in competencies can be very effective in identifying organization needs for training or revised procedures. Three programs are actively doing this and finding significant value as a result.

Practices to consider – These practices outline how some companies are addressing specific needs of their programs that might be useful to other programs.

Below is a list of practices that programs might consider, if they have a need or an opportunity to utilize these practices for their particular program. These are not best practices that apply to all programs.

- Use of proficiency scales – Seven programs are using proficiency scales as opposed to a binary rating of competent and not yet competent. Use of proficiency scales gives programs the ability to identify employees who have a competency level significantly above the average employee. These programs are utilizing the approach along with performance ratings in their succession planning efforts.

- Use of competencies in the hiring process – Six programs are utilizing some degree of competency assessments in the hiring process. The typical way of doing this is through proctored knowledge testing, but some programs have operational personnel performing a mini competency assessment in the hiring process.
- Use of proctored knowledge testing– Five programs are migrating some or all of their knowledge related assessments to proctored knowledge testing. This has the capability of significantly reducing assessor workload and increasing the objectivity of an employee knowledge. The programs utilizing this are extremely positive of the benefits of it.
- Programs designed as “Career Development Programs” – Six programs have designed their assurance programs as “Career Development Programs” that provide a stronger “what’s in it for me” message to employees. They communicate these programs as primarily a mechanism to improve your career opportunities in the company.
- Requirements for promotion – Five programs are requiring that an employee is not eligible for a promotion until they have been deemed competent on all of the competencies for their existing job position. This can provide motivation for employees to drive the assessment process are relieve supervisors and assessors from having to do this.
- Program metrics on a corporate scorecard– Six programs have included the metrics for the programs as one of the primary metrics on their corporate scorecard. This practice enhances the visibility of and the value of CAP programs.
- Documentation on how competency gaps are closed – Four programs are documenting how competency gaps were closed. They identify where formal training, on the job training and coaching or self-development were utilized to close any competency gaps.
- Designation of “critical competencies” – Four programs have identified a subset of critical competencies (usually around 30% of the total number of competencies for a given position) that are higher risk and need to be assessed first. This practice can better focus the initial assessments performed on newly hired or promoted employees.
- Use of internal assessors not assigned to a specific rig or service location– Four programs are utilizing the use of assessors not associated with a given rig or service location to assess their employees. This can provide much more accurate assessments that identify competency gaps and minimize the impact of social relationships that sometimes prevent this from occurring. These four companies are finding a much larger percentage of competency gaps (in the range of 10 -30%) of all competencies assessed and feel this a much more objective way of performing assessments.