



**Best Practices Committee Meeting  
Monday, April 15 – Colorado Springs, CO  
8:30 – 10:50 a.m. (Mountain)**

**COMMITTEE PURPOSE**

The Best Practices Committee is charged with overseeing the Common Ground Alliance Best Practices. Based on the Common Ground Study, the Committee developed CGA's Best Practices field manual that is now the official Best Practices publication, which is updated on an annual basis. Multiple new practices are approved each year and included in the latest version of the document. The CGA Best Practices are agreed on by consensus of all 16 CGA stakeholder groups. The process of introducing a new practice for consideration originates in the Best Practices Committee, with all approved proposals advancing to the CGA Board of Directors for consensus approval.

**MEETING OBJECTIVES:**

- Provide overview of Best Practices Committee Process
- Review proposed Transaction Record (TR) Proposals
- Receive updates from task teams and working groups

**CO-CHAIRS:**

- Scott Brown, Washington Gas
- Thurman Smith, UtiliQuest

**PRIMARIES:**

- Phil Baca, Kinder Morgan – Gas Transmission
- Susan Bohl, Okie 811 – 811/One Call
- Scott Brown, Washington Gas – Gas Distribution
- Steven Giambone, Pipeline Safety, Louisiana Department of Conservation – State Regulators
- Jim Holzer, One Call Concepts – One Call
- Troy Holzworth, Summit Utilities Services LLC – Locator
- Brent Hunziker, Whitaker Construction Company – Road Builders
- Bill Johns, Utility Coordinating, Inc. – Engineering/Design
- Scott Marshall, Virginia State Corporation Commission – State Regulators
- Erich Metzger, Charge EPC – Excavation
- Thurman Smith, UtiliQuest – Locator
- Kirk Steinberger, Kinder Morgan – Oil
- Tammy Wilfong, Verizon – Telecommunications
- Kurt Youngs, NUCA – Excavation

## Best Practices Meeting – April 15, 2024

- Monty Zimmerman, City of Lenexa – Public Works
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### 1. Welcome, Introductions and Committee Overview (S. Brown and T. Smith)

- CGA Antitrust Statement

**Note:** The meeting room was packed, and a number of attendees were present for their first Best Practices Committee.

### 2. Best Practices Committee Overview/Process (Co-Chairs)

- Best Practices Background
- Structure and Process

**Notes:** The co-chairs reminded the committee that Best Practices are not just good ideas, they are in use somewhere and demonstrated to be effective. The Committee identifies Best Practices and incorporates them into the CGA Best Practices.

*Note: We currently have 10 active task teams/working groups.*

### 3. 2024 Committee Goal and Objectives

- Goal: Drive the identification, vetting and approval of Best Practices that address critical damage prevention issues and top damage root causes.
  - Objective: Review Best Practices and identify gaps/opportunities for each of the six top root causes identified within DIRT.
- Objective: Ensure that each working group/TR established by the committee is specifically addressing a practice that will advance the industry in addressing one or more of the critical challenges.

### 4. Transaction Records (TR) Task Team Updates and Wording Review

- |  |
|--|
| - <b>TR 2023-04: Bilingual Efforts</b><br>Task Team Chair – Rosemary Langowski |
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**Status:** 30-day posting done on March 15, 2024.

- Proposal – Update Practice 8-3

**Approval:** The committee approved the recommended proposal for this practice. See attached document for approved wording.

**TEAM STATUS/NEXT STEPS:** The wording will be forwarded to the editorial team for review and then sent to the Board of Directors for final approval. The team is receiving input from

## Best Practices Meeting – April 15, 2024

a task team of the Educational Programs and Marketing Committee on future items they may want to consider for Best Practices.

### ONGOING

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|--|
| - <b>TR 2021-01: Review of Chapter 3 – 811 Center</b><br>Task Team Chair – Dominic DiCarlantonio |
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**Status:** 30-day posting done on March 15, 2024.

- Proposal – Update Practice 3-23

**Approval:** The committee approved the recommended proposal for this practice with two minor editorial changes. The wording will be forwarded to the editorial team for review and then sent to the Board of Directors for final approval.

**TEAM STATUS/NEXT STEPS:** Team has draft language in queue for other practices in Chapter 3 (811 Center) and hopes to present more proposals in the upcoming committee meetings.

### ONGOING

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|---|
| - <b>TR 2023-01: Subsurface Utility Engineering (SUE)</b><br>Task Team Chairs – Kirk Kirkpatrick and Nick Zembillas |
|---|

**Status:** 30-day posting done on March 15, 2024.

- Proposal – NEW Practice – Designating and Depicting for the Protection of Known Underground Facilities
- Proposal – NEW Definition – Alternative Project Delivery Methods

**Notes:** Bill Kiger represented the team. The committee reviewed both proposed changes for a new practice and a new definition. The committee made the following decisions:

- Proposed new practice. Primaries from several industry groups expressed concern from their stakeholder groups about the phrase “additional compensation” and that they would like further clarification.
- Proposed new definition was approved with one editorial change.

**New Definition Approval:** The committee approved the proposed new definition, “Alternative Project Delivery Methods” (with editorial change). See attached documentation for final approved wording.

**TEAM STATUS/NEXT STEPS:** The wording for the proposed new definition will be forwarded to the editorial team for review and then sent to the Board of Directors for final

## Best Practices Meeting – April 15, 2024

approval. The wording for the proposed new practice, “Designating and Depicting for the Protection of Known Underground Facilities” will be returned to the task team for further development.

### ONGOING

- |   |
|---|
| - <b>TR 2023-05: Ticket Life and Preservation of Marks</b><br>Task Team Chair – John Sparks |
|---|

**Status:** 30-day posting done on March 15, 2024.

- Proposal – Update Practice 4-8

**Notes:** The committee approved two edits to the initial paragraph in the Practice Description of the proposed modification to 4-8. However, they suggested cleaning up the grammar in the proposed (new) second paragraph of the modification. There was even commentary about keeping the proposed first sentence of that paragraph and adding a parenthetical statement referring to Appendix B, Uniform Color Code and Marking Guidelines.

**Approval:** The committee approved two edits to the initial paragraph of the proposal for practice 4-8.

**TEAM STATUS/NEXT STEPS:** The team will continue its work on practice 4-8. Approved editorial changes will be held and submitted to the editorial team for review and to the Board of Directors for final approval after the complete recommendation has been approved by the committee.

### ONGOING

## 5. Task Team and Working Group Updates

- |  |
|--|
| - <b>Excavation Forecasting Working Group</b><br>Task Team Chairs – Shane Alexander, Amy Averill and Shane Ayers |
|--|

**Status:** Team continues to discuss how companies currently forecast, as well as information from the locating perspective on how locate companies respond to large projects and advance notice.

**Notes:** The team is looking for models where successful forecasting is being done. Anyone who is doing this now, please send your model information to Steve Light.

### ONGOING

## Best Practices Meeting – April 15, 2024

- **Mapping Working Group**  
Task Team Lead – John Hannel

**Status:** Team last met on March 14. Team is developing and reviewing drafts for sections of Chapter 6 (“Mapping”), specifically looking at practices for owners/operators.

**Notes:** The team is discussing how much detail to include for current mapping technologies, and trying to determine if it will be a problem if they push for a specific standard or are better off with a larger standard as opposed to something more narrow/accurate. The team would like more involvement from utilities with models for real world examples of effective accurate GIS mapping. The team hopes for a solid draft with examples by July.

### ONGOING

- **Marine Practices Working Group**  
Task Team Chair – Ed Landgraf and Steven Giambrone

**Status:** Team last met on April 4. Team is discussing changes to 4.20A and wants to talk with the Committee about possible addition of marine excavation practices to Best Practices.

**Notes:** Ed talked about the recent incident in Baltimore at the Francis Scott Key Bridge and specifics of marine excavation there and how they relate to Best Practices. The team requested TR status as well as a new chapter for Marine or underwater excavation. Ed is part of a team that has been working with NTSB and they have already developed underwater best practices. The Best Practices working group would like to envelop them into the CGA Best Practices.

It was suggested that marine excavators need to be involved with the efforts, and Ed said that there are 2 on the task team. The request from the team for a separate chapter is due to confusion that may exist if the team enters marine practices into the other chapters that already exist in Best Practices. It was also suggested that the team needs to have operators with underwater facilities involved in the discussion.

**Approval:** The committee approved task team status for the Marine Practices Working Group. The team will now be known as TR 2024-01 – Marine Practices.

**TEAM STATUS/NEXT STEPS:** The team anticipates posting a possible modification to 4-20.A in June for consideration at the July Best Practices meeting.

### ONGOING

## Best Practices Meeting – April 15, 2024

- **TR 2022-02 – Abandoned Facilities**  
Task Team Chair – Monty Zimmerman

**Status:** Team last met on March 6. Team has been monitoring Texas 811/Line-Scape program that shares known abandoned facility information with excavators. Also looking at states that have requirements in their laws for possible best practice ideas.

**Notes:** We received an update on the Texas 811/Line-Scape program. It is moving into Oklahoma and Utah. Additionally, Texas is now tracking data that shows a 61% reduction in damages in the areas where they are sharing the abandoned line data. Monty suggested that the team may consider different practices based on utility types in order to gain consensus. The committee voiced support for this idea.

### ONGOING

- **TR 2022-03 – Disaster Preparation and Response**  
Task Team Chairs – Bill Kiger and Ruth Weintraub

**Status:** Team last met on Oct. 24. Team has assembled a number of resources/references in team library on Engage. Beginning to work on draft language for a possible Best Practice.

**Notes:** Bill talked about the team library as well as impacts in 2024 with catastrophic events. Education programs with emergency response folks should be part of this process.

### ONGOING

- **TR 2023-02 – Ticket Load Leveling/Scheduling**  
Task Team Chair – Brian Dreesen

**Status:** Team last met on March 25. A number of promising developments in several states are being discussed. Team is looking to develop a practice that could help manage the amount of work that is coming in from all levels – 811 center/operator/locator/excavator.

**Notes:** The team is looking at a number of practices related to things that can help manage workloads on multiple levels. Items are currently under consideration in several states, most of which have potential to help address the topic.

### ONGOING

## 6. New Practices/Updates

**Notes:** A recommendation was received in late January from One Call Concepts (OCC) about developing a social media best practice. Their recommendation was well-detailed. The committee decided to refer this item to the Educational Programs and Marketing Committee for further review.

## **Best Practices Meeting – April 15, 2024**

**Announcement:** Erich Metzger of Charge EPC was announced as the new co-chair for the Best Practices Committee. He will replace outgoing co-chair Thurman Smith.

**ACTION ITEM:** CGA staff will forward OCC social media best practice recommendation to co-chairs of the Educational Programs and Marketing committee.

### **7. Meeting Schedule 2024**

- **July 22-25** – Summer Committee Summit (Nashville, TN)
- **October 28-30** – Fall Committee Summit (Las Vegas, NV)

### **8. Adjourn (Co-Chairs)**



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## Antitrust Compliance Statement

As a general matter, the antitrust laws prohibit competitors from any agreement, formal or informal, that may restrain trade unreasonably. This includes, but is not limited to, agreements on the prices they will charge, the customers they will serve, the markets or territories in which they will compete, or refusals to deal with business partners or competitors.

CGA members and meeting participants may compete with one another. Accordingly, at all meetings or gatherings of CGA members or participants, and at meetings of the CGA board, CGA, its board, its members and its meeting participants should refresh themselves with this antitrust compliance statement and abide by all laws, including antitrust laws.

At meetings, conferences, or other gatherings of CGA members and participants, whether in-person or electronically, there should be no discussion or disclosure of information with respect to the following:

- (a) competitor prices, costs, profits, premiums, surcharges, or discounts;
- (b) allocation of customers among competitors;
- (c) allocation of geographic or product markets among competitors;
- (e) any refusal to deal with a competitor, customer or supplier;
- (f) responses to the market behavior of a competitor by a competitor, or
- (g) any other discussion that could be the basis for an agreement to restrain competition or a topic involving a potentially anticompetitive practice.

It is not only your duty to follow this policy, but also to affirmatively stop any conversations on impermissible subjects and inform CGA staff.



# Best Practices Committee

April 15, 2024



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**Conference WiFi:** CGA\_Vermeer

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# Best Practices Committee

## Co-Chairs

- **Scott Brown** - Washington Gas
- **Thurman Smith** - UtiliQuest

## Best Practices Committee Goals

- Streamline process to increase efficiency.
- Remove barriers to success and facilitate consensus opportunities.
- Increase consistent and informed stakeholder participation.



# Meeting Reminders

## ACCESS & ATTENDANCE



Wear your badge at all times including networking events.

Scan your badge before or after each meeting/session.

## INTRODUCTIONS



Please introduce yourself, provide your company name and stakeholder group when speaking.

## DISCUSSIONS & QUESTIONS



We encourage participation, questions and discussion throughout the conference.

# CGA Antitrust Statement

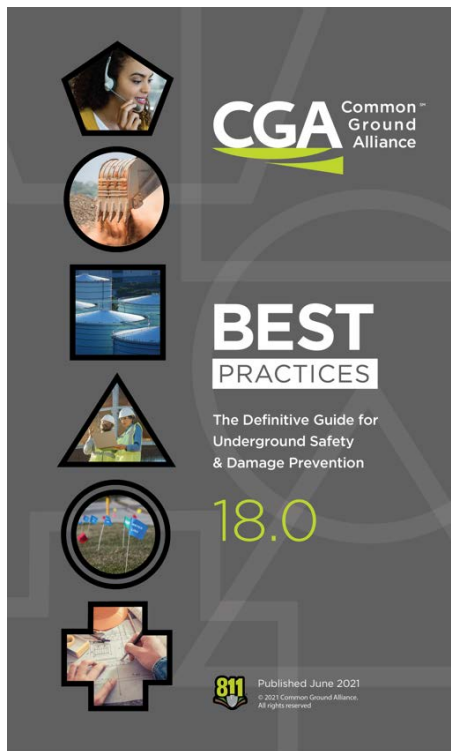
- Antitrust laws prohibit competitors from any agreement, formal or informal, that may restrain trade unreasonably.
- CGA members and meeting participants may compete with one another. Accordingly, all CGA attendees should comply with all laws, including antitrust laws.
- There should be no discussion or disclosure of information at the CGA Conference that would not be in compliance with antitrust laws.
- **See agenda for full CGA Antitrust Compliance Statement.**

# Best Practices Structure and Meeting Process

**Best Practices Committee:** The Best Practices Committee is responsible for maintaining and updating the CGA Best Practices Guide. The CGA Best Practices are agreed on by consensus of all 16 CGA stakeholder groups and designed to improve worker safety, protect vital underground infrastructure and ensure public safety during excavation activities conducted in the vicinity of existing underground facilities.

# Best Practices Process

- Approximately 165 practices developed through consensus
- Task teams review potential new Best Practices or modifications





# Current Best Practices Transaction Records and Working Groups

- **TR 2021-02** - Review of Chapter 3 811 Center
- **TR 2022-02** - Abandoned Facilities
- **TR 2022-03** - Disaster Preparation and Response
- **TR 2023-01** - Subsurface Utility Engineering
- **TR 2023-02** - Ticket Load Leveling/Scheduling
- **TR 2023-04** - Bilingual Efforts
- **TR 2023-05** – Ticket Life and Preservation of Marks
- Mapping Working Group
- Excavation Forecasting Working Group
- Marine Practices Working Group



# Meeting Objectives

- Provide overview of Best Practices Committee Process
- Review proposed Transaction Records Proposals
- Receive updates from task teams and working groups

# Transaction Records (TR) Task Team Wording Review



# Best Practices Transaction Records

## TR 2023-04: Bilingual Efforts

Task Team Chair – Rosemary Langowski

**Background:** Group formed after a suggestion at the July 2022 Committee meeting to consider bilingual content for public awareness efforts.

**Status:** Wording posted for 30-day review March 15, 2024.

[8.3 Target Audiences and Needs](#)

**For Review and Approval Consideration**

# Best Practices Transaction Records

## TR 2021-01: Review of Chapter 3 – 811 Center

Task Team Chair – Dominic DiCarlantonio

**Background:** The Best Practices Committee agreed to establish a TR to review all proposals stemming from the OCSI Committee’s review of Chapter 3.

**Status:** Wording posted for 30-day review March 15, 2024.

[3.23 811 Center Quality Standards](#)  
**For Review and Approval Consideration**

# Best Practices Transaction Records

## TR 2023-01: Subsurface Utility Engineering (SUE)

Task Team Chairs – Kirk Kirkpatrick/Nick Zembillas

**Background:** Committee established group to review references / practices within the Best Practices related to SUE.

**Status:** Wording posted for 30-day review March 15, 2024.

[New Practice Proposal Designating and Depicting for the Protection of Known Underground Facilities](#)  
**For Review and Approval Consideration**

[New Definition Proposal Alternative Project Delivery Methods](#)  
**For Review and Approval Consideration**

# Best Practices Transaction Records

## Proposed TR 2023-05: Ticket Life and Preservation of Marks

Task Team Chair – John Sparks

**Background:** Group formed at the recommendation of the 2020 DIRT Report and Best Practices Advisory Group. Focus is ticket life and preservation of marks to include offset marking, re-marks, purpose of updates, and re-notify tickets .

**Status:** Wording posted for 30-day review March 15, 2024.

[4.8 Facility Marking](#)

**For Review and Approval Consideration**

# Working Group Overview and Recent Progress



# Best Practices Working Groups

## Excavation Forecasting Working Group

Task Team Leads – Shane Alexander/Amy Averill/Shane Ayers

**Background:** Group formed at April 2023 meeting to consider a practice of excavators providing work forecasts to operators/locators in advance of beginning major projects.

**Status:** Some members are sharing forecasting plans/models with the team for discussion.



# Best Practices Working Groups

## Mapping Working Group

Task Team Lead – John Hannel

**Background:** Team established during July 2022 meeting based on discussion about non-participants in the 811 system and inability for smaller municipalities to record records in GIS.

**Status:** Focusing on Facility Owner/Operator section of Chapter 6 given facility mapping is the key.

# Best Practices Working Groups

## Marine Practices Working Group

Task Team Leads – Ed Landgraf and Steven Giambrone

**Background:** Team established during April 2023 meeting to review 4-20 A & B (Locating and Marking in Navigable Waterways – Permanent Markers & Temporary Markers).

**Status:** Team is reviewing 4-20 A & B. Team wants input from Committee on possible addition of marine excavation practices to Best Practices.

# Best Practices Working Groups

## TR 2022-02: Abandoned Lines

Task Team Chair - Monty Zimmerman

**Background:** The Committee agreed to establish this team the TR for this team which initially met to look at potential updates to practices related to abandoned lines.

**Status:** Looking at Texas 811 program, which is expanding into other states. Does the Committee think this model is worth consideration for the basis of a Best Practice? Should team consider different practices based on utility type?

# Best Practices Working Groups

## TR 2022-03 - Disaster Response and Recovery

Task Team Leads – Bill Kiger and Ruth Weintraub

**Background:** Discussion suggested potential new appendix as well as potential new practices by chapter. Ideas included maintaining of information (emergency contacts), extraordinary circumstances wording/documentation, DHS contacts by state, documentation of electric industry practices and other relevant practices.

**Status:** Team last met on October 17. Beginning work on draft statement.

# Best Practices Working Groups

## TR 2023-02 Ticket Load Leveling/Scheduling

Task Team Leads – Brian Dreesen

**Background:** Group formed after a suggestion at the July 2022 Committee meeting to review updating 5-1 (811 Facility Locate Request) to reflect scheduling of tickets in advance of legal waiting period.

**Status:** Team is monitoring efforts in multiple states that may help manage amount of work on multiple levels – 811 Center/Operator/Locator/Excavator.

# New Practice / Updates

1. [Proposed new practice – Social Media Practice \(One Call Concepts\)](#)

# On Tap for Today

## 11:00 a.m. -- Best Practices LIVE

All Committee Members are invited to attend!

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## 12:00 p.m. -- CGA Luncheon

Featured Speaker - Shawn Lyon

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## 3:45 p.m. – Exhibit Hall Grand Opening & Reception

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# Summer Committee Summit

July 22-25: Nashville, TN

## Monday, July 22

Board of Directors

## Tuesday, July 23

### Best Practices

Morning – DPI Advisory  
Committees

Afternoon – Technology

## Wednesday, July 24

Joint: Data/DPI Metrics  
Committee

Education & Marketing

## Thursday, July 25

Morning – OCSI



# Fall Committee Summit

October 28-30: Las Vegas, NV

## Monday, Oct. 28

Afternoon – Next Practices and  
DPI Advisory Committees

## Tuesday, Oct. 29

Joint: Data/DPI Metrics Committee  
Education & Marketing  
Afternoon – Technology

## Wednesday, Oct. 30

Morning/Early Afternoon – **Best  
Practices**

Afternoon – OCSI

# As you head out...

Attendance

Please scan your badge as you are exiting.

Session  
Survey

Complete your post-session survey in the conference app.

Presentations  
& Handouts

These will be accessible in the app after the conference.

# Contact Information

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- Erika Lee – [erikaa@commongroundalliance.com](mailto:erikaa@commongroundalliance.com)
- Steve Light – [slight@commongroundalliance.com](mailto:slight@commongroundalliance.com)



**PROPOSED MODIFICATION TO PRACTICE 8-3 (*Redline follows*)**

**8.3 Target Audiences and Needs**

**Practice Statement:**

An effective damage prevention education program identifies and implements a plan that addresses individual needs, including languages other than English where appropriate.

**Practice Description:**

Identification of target audiences ensures maximum impact for the Dig Safely message. The following target audiences are identified as examples:

- Professional designers
- Surveyors
- Equipment suppliers, distributors, and rental companies
- Construction management officials
- Excavation equipment operators
- Excavation equipment rental stores
- Excavators
- Public works excavators
- Locators
- Railroads
- Participating facility owners/operators
- Non-participating facility owners/operators (i.e., not one call members)
- Agricultural industry members
- Public officials
- Planning, zoning, licensing, permitting, and code enforcement officials
- Public utility board members
- Homeowners and associations
- Schools
- Landscape companies
- Geotechnical and environments soil testing laboratories
- Insurance industry members
- Marine operators
- Children
- Property owners/tenants
- Emergency responders/local emergency planning committee members
- News media

When target audiences are identified, their specific needs can be more readily addressed. This helps identify which media (e.g., free advertising, advertising, brochure, meal meetings, handouts, door hangers, yard cards, etc.) can most effectively be used to deliver the message. This also facilitates customization of the message itself. Coordination with other strategic partners can assist in reaching the greatest number of people.

**References:**

- Various 811 centers including AL, AZ, CO, CT, GA, FL, ID, IL, IA, KY, MS, MO, NM, NY (City), NC, OK, OH, OR, TX, VA, WV, and WI
- NUCA and various NUCA state chapters
- API, INGAA, and AGA member companies
- Associated General Contractors (AGC) chapters
- Door hangers from TCS Communications, LLC, of Florida
- Yard cards from Ohio Utilities Protection Service

## REDLINE MODIFICATIONS TO 8-3 BELOW

### 8.3 Target Audiences and Needs



**Practice Statement:**

An effective damage prevention education program identifies and implements a plan that addresses ~~includes identification of target audiences and their~~ individual needs, including languages other than English where appropriate.<sup>32</sup>

**Practice Description:**

Identification of target audiences ensures maximum impact for the Dig Safely message. The following target audiences are identified as examples:

- Professional designers
- Surveyors
- Equipment suppliers, distributors, and rental companies
- Construction management officials
- Excavation equipment operators
- Excavation equipment rental stores
- Excavators
- Public works excavators
- Locators
- Railroads
- Participating facility owners/operators
- Non-participating facility owners/operators (i.e., not one call members)

## TR 2023-04 – Bilingual Efforts

Task Team Chair – Rosemary Langowski

*Proposal Approved by Task Team – January 11, 2024*



- Agricultural industry members
- Public officials
- Planning, zoning, licensing, permitting, and code enforcement officials
- Public utility board members
- Homeowners and associations
- Schools
- Landscape companies
- Geotechnical and environments soil testing laboratories
- Insurance industry members
- Marine operators
- Children
- Property owners/tenants
- Emergency responders/local emergency planning committee members
- News media

When target audiences are identified, their specific needs can be more readily addressed. This helps identify which media (e.g., free advertising, advertising, brochures, meal meetings, handouts, door hangers, yard cards, etc.) can most effectively be used to deliver the message. This also facilitates customization of the message itself. Coordination with other strategic partners can assist in reaching the greatest number of people.

### References:

- Various ~~one-call~~ [811](#) centers including AL, AZ, CO, CT, GA, FL, ID, IL, IA, KY, MS, MO, NM, NY (City), NC, OK, OH, OR, TX, [VA](#), WV, and WI
- NUCA and various NUCA state chapters
- API, INGAA, and AGA member companies
- Associated General Contractors (AGC) chapters
- Door hangers from TCS Communications, LLC, of Florida
- Yard cards from Ohio Utilities Protection Service

**PROPOSED MODIFICATION TO PRACTICE 3-23 (Redline follows)**

**3.23: 811 Center Quality Standards**

**Practice Statement:**

The 811 center establishes and monitors performance standards for the operation of the center.

**Practice Description:**

A. Customer Quality of Service Performance Measurements

811 centers monitor the quality of service provided to a customer who submits a locate request. Key performance indicators include, but need not be limited to, average speed of answer, service level, hold time, call abandonment rate, handle time (talk time), and quality assurance. These recommendations help to fulfill a high quality of customer service while promoting accuracy, cost effectiveness, and efficiency are identified below. Measuring performance metrics qualifies as a “best” practice.

1. Average Speed of Answer/Service Level/Hold Time

These metrics measure the amount of time it takes from a call being connected to being answered by an agent or customer service representative (CSR). Some centers include the pre-announcer menu time in this calculation.

2. Abandoned Call Rate

This measures the amount of time a caller is on hold before they hang up or disconnect. Not meeting caller expectations could lead to repeat calls, or worse, encourage callers to excavate without having an 811 notice. Callers have an expectation that all calls will be answered within a reasonable time.

3. Handle Time/Talk Time

This indicates the amount of time it takes an agent/CSR to process a call and complete any locate requests made by that caller. It may include time after the call to properly process the request. While this measures internal efficiencies, higher handle time/talk time can lead to higher levels in other areas, such as average speed of answer and abandoned call rate.

The 811 center measures the amount of time each call takes at the individual CSR level. The emphasis is on both quality and efficiency to allow for difficult or complicated locate requests. Handle time may vary based on the level of ticket difficulty.

4. Quality Assurance

811 centers have a defined quality assurance program with measurable targets. The program will ensure the accuracy of locate requests than an 811 center processes. A quality assurance program has processes or standards for both voice requests and electronic/internet requests.

#### 5. Systems Availability

811 centers measure up-time percentages for critical systems. 811 centers receive a high volume of locate requests that are processed through electronic/internet systems. High levels of availability for all systems are crucial components of a successful 811 center. Systems availability may impact voice and electronic/internet capabilities for processing requests.

#### B. Notification Transmission

The 811 center establishes and monitors criteria for the transmission of notifications and notification audit reports.

The 811 center can transmit notifications in an electronic format that allows receiving stations to parse/extract data. Typically, notification transmission is immediate.

Notification audit reports are sent to receiving stations at a mutually acceptable frequency. The best practice is to send an audit report at least once every day.

811 centers monitor transmissions by actively looking for delivery anomalies to investigate and resolve issues promptly.

#### References:

- One Call Systems International Voluntary Recognition Program
- “Model One Call for the 20<sup>th</sup> and 21<sup>st</sup> Century,” AT&T (was available when the practice was created but no longer available)
- Existing operating practices from various states 811 centers

## REDLINE MODIFICATIONS TO 3-23 BELOW

### 3.23 811 Center Quality Standards



#### Practice Statement:



The 811 center establishes and monitors performance standards for the operation of the center.

**Practice Description:**

A. Customer Quality of Service Performance Measurements

811 centers monitor the quality of service provided to a customer who ~~phones in~~ submits a locate request. Key performance indicators include, but need not be limited to, average speed of answer, service level, hold time, call abandonment rate, handle time (talk time), busy signal rate, and quality assurance, customer satisfaction. ~~These recommendations help recommended benchmarks~~ to fulfill a high quality of customer service while promoting accuracy, cost effectiveness, and efficiency are identified below. Measuring performance metrics Meeting or exceeding a benchmark qualifies as a “best” practice.

1. —1. Average Speed of Answer/Service Level/Hold Time

These metrics measure the amount of time it takes from a call being connected to being answered by an agent or customer service representative (CSR). Some centers include the pre-announcer menu time in this calculation. Average speed of answer (ASA) usually comprises the number of seconds between the time a caller is transferred from the Interactive Voice Response (IVR) system and the time a voice welcomes the caller and begins the processing of a locate request averaged over a specified time interval and accumulated daily. Service level objectives in the 811 center industry are generally monitored daily, monthly, and year to date. An ASA objective of 30 seconds or less is recommended.

2. Abandoned Call Rate

This measures the amount of time a caller is on hold before they hang up or disconnect. Not meeting caller expectations could lead to repeat calls, or worse, encourage callers to excavate without having an 811 notice. The incidence of abandoned incoming calls is a function of the number of 811 center customer service representatives actively processing locate requests and the volume of incoming calls. Callers have an expectation that all calls will be answered within a reasonable time. A caller that has waited more

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~~than 60 seconds before hanging up is considered an abandoned call. A monthly average abandonment rate that is less than 5% is recommended.~~

### 3. Handle Time/Talk Time Busy Signal Rate

~~This indicates the amount of time it takes an agent/CSR to process a call and complete any locate requests made by that caller. It may include time after the call to properly process the request. While this measures internal efficiencies, higher handle time/talk time can lead to higher levels in other areas such as average speed of answer and abandoned call rate. The incidence of callers experiencing busy signals is a function of the number of incoming telephone lines to the 811 center and the incoming call volume. Callers have an expectation that there will be very few busy signals.~~

~~The 811 center measures the amount of time each call takes at the individual CSR level. The emphasis is on both quality and efficiency to allow for difficult or complicated locate requests. Handle time may vary based on the level of ticket difficulty. Typically, 811 centers can extract information on busy signals from their telephone systems or obtain the information from their communications service providers. The information usually comprises the number of callers experiencing a busy signal as a percentage of the total number of attempts to contact the 811 center during normal business hours.~~

~~Service level objectives are reported daily, monthly, and year to date. A monthly average busy signal rate that does not exceed 1% is recommended.~~

### 4. Quality Assurance Customer Satisfaction

~~811 centers have a defined quality assurance program with measurable targets. The program will ensure the accuracy of locate requests that an 811 center processes. A quality assurance program has processes or standards for both voice requests and electronic/internet requests. A fundamental principal in measuring quality is that "the customer defines quality." Periodic customer satisfaction surveys are conducted. The 811 center makes all information/data collected on the quality of its performance available for review by the appropriate oversight authority and the public upon request.~~

### 5. Systems Availability



~~811 centers measure up-time percentages for critical systems. 811 centers receive a high volume of locate requests that are processed through electronic/internet systems. High levels of availability for all systems are crucial components of a successful 811 center. Systems availability may impact voice and electronic/internet capabilities for processing requests.~~

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#### B. ~~Locate Request Quality~~

~~The 811 center has in place quality control and quality assurance programs to measure and monitor the accuracy and completeness of the information received by the 811 center compared to the information transmitted by the 811 center.~~

#### C. Notification ~~Delivery Transmission~~

The 811 center establishes and monitors criteria for the transmission of notifications and notification audit reports.

~~Typically, t~~The 811 center can transmit notifications in an electronic format that allows receiving stations to parse/extract data. Typically, notification transmission is immediate.

Notification audit reports are sent to receiving stations at a mutually acceptable frequency. ~~It is a~~ The best practice to send an audit report at least once every business-day. ~~Typically, notification transmission is immediate.~~

#### References:

- One Call Systems International Voluntary Recognition Program
- "Model One Call for the 20<sup>th</sup> and 21<sup>st</sup> Century," AT&T (was available when the practice was created but no longer available)
- Existing operating practices from various states' one call centers

Commented [SL1]: Is this something that should be removed since no longer available?

## PROPOSED NEW PRACTICE

### **Designating and Depicting for the Protection of Known Underground Facilities in the Construction Path**



#### **Practice Statement:**

Project Owners have a process that identifies their responsibility for preventing damages to existing facilities during the construction phase of excavation projects. In cases where projects are moved to the construction phase without adequately accounting for the precise location of known existing public and private underground facilities within the scope of the project, additional compensation shall be required.

#### **Practice Description:**

If the construction plans do not provide the applicable quality level of the SUE process in the planning and design phase, as outlined in Practice Statement 2.14 – Subsurface Utility Engineering (SUE), a process is required that ensures the precise location of facilities within the construction path are adequately accounted for and protected during excavation and backfill operations.

With the adoption of alternative project delivery methods, there is a need to reinforce proven damage prevention best practices. Identifying and verifying the location of existing underground facilities in advance of construction is a proven method to prevent damages and the responsibility needs to be detailed so there is no ambiguity.

#### **Benefits:**

The benefits associated with this practice are multiple; Service interruptions to customers are minimized, productivity and bid/estimate accuracy are maintained, employee and public safety are achieved by the avoidance of excavation related damage, and the issue of compensation is addressed in advance of the work.

#### **References:**

- AQUA of Pennsylvania, Design and Construction Requirements.

<b>PROPOSED NEW DEFINITION</b>
--------------------------------

**Alternative Project Delivery Methods:** Infrastructure projects can be delivered through various alternative methods, including:

1. Design-Bid-Build (DBB): Traditional method where the project owner contracts separately with a designer/architect for the design phase, then with a construction contractor for the construction phase.
2. Design-Build (DB): A single entity is responsible for both the design and construction phases, streamlining the process and potentially reducing project duration.
3. Public-Private Partnership (PPP or P3): Involves collaboration between a public agency and a private sector entity to finance, design, construct, operate, and maintain infrastructure projects.
4. Construction Management at Risk (CMAR): The construction manager works with the project owner and designer during the design phase and then assumes responsibility for delivering the project within a guaranteed maximum price.
5. Build-Operate-Transfer: A private entity finances, builds, and operates a facility for a specified period before transferring ownership to the public sector.
6. Design-Build-Operate-Maintain (DBOM): Similar to BOT, but the private entity also operates and maintains the facility after construction.
7. Progressive Design-Build (PDB): PDB uses a qualifications-based or best value selection, followed by a process whereby the owner then “progresses” towards a contract price with the team (thus the term “Progressive”).

Each method has its own advantages and challenges, and the choice often depends on project requirements, risk allocation preferences, and funding mechanisms.

**PROPOSED MODIFICATION TO PRACTICE 4-8 (Redline follows)**

**4.8 Facility Marking**

**Practice Statement:**

Facilities are adequately marked for conditions.

**Practice Description:**

Facility locators match markings to the existing and expected surface conditions. Markings may include one or any combination of the following: paint, chalk, flags, stakes, or brushes. All marks extend a reasonable distance beyond the bounds of the requested area. Proper training for all facility locators includes properly identifying the varying surface and environmental conditions that exist in the field and what marking methods should be used. Conditions that may affect markings are rain, snow, vegetation, high traffic, construction, etc.

Offset markings should be used if site conditions make it difficult or impractical to adequately mark or maintain the centerline of the underground facility. By providing offset marks on a firm surface or on established/permanent objects, these offsets will assist contractors in preserving the marks, and adhere to best practices during excavation. They enhance visibility and durability in diverse weather conditions, serving as reliable reference points to ensure accuracy of establishing the tolerance zone and safety throughout construction, regardless of the weather. Communication with the contractor is also critical when using offset marking to describe locate utilities.

**REDLINE MODIFICATIONS TO 4-8 BELOW**

**4.8 Facility Marking**



**Practice Statement:**

Facilities are adequately marked for conditions.

**Practice Description:**

Facility locators match markings to the existing and expected surface conditions. Markings may include one or any combination of the following: paint, chalk, flags, stakes, or brushes, or offsets. All marks extend a reasonable distance beyond the bounds of the requested area. Proper training for all facility locators includes properly identifying the varying surface and environmental conditions that exist in the field and what marking methods should be

used. Conditions that may affect markings are rain, snow, vegetation, high traffic, construction, etc.

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## Steve Light

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**From:** Sarah Daley via Smartsheet <automation@app.smartsheet.com>  
**Sent:** Wednesday, January 24, 2024 6:01 PM  
**To:** Steve Light  
**Subject:** [SPF ERROR] Changes to Best Practices New Proposal: Grace Engstrom, Kurt Klenzman, Jim Holzer



External (automation@app.smartsheet.com)



### [Best Practices New Proposal](#)

Changes since 1/24/24 2:58 PM

**1** row added , **1** row changed

**9** attachments added

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**1** row added or updated (shown in **yellow**)

Row 1

<b>Status</b>	New
<b>Status Date</b>	01/24/24
<b>new or revision</b>	New Proposal - This is a proposal for a new best practice.
<b>Revision of Practice ID</b>	
<b>Purpose</b>	The proposed social media best practice aims to provide members of the damage prevention industry a proven framework for implementing a sustainable and effective social media strategy that can enhance their ongoing public education and awareness outreach efforts.
<b>Rationale</b>	The proposed social media best practice originates from the One Call Concepts creative team. We have the privilege of managing over 30 social media channels for One Call Centers across the United States. Because of the varied needs of our clients, and the volume of the requests we determined it would be beneficial for us to research and develop a strategic framework to meet their demands and ensure the published content achieves stated goals and supports the brand.



Since instituting this framework, we've seen great success in not only the engagement with our client's online communities, but also with the clients themselves. They are seeing the value in social media as a legitimate marketing investment and spending more of their time and budget to share vital damage prevention information digitally.

Social media has been a recognized marketing tool in the damage prevention industry for many years though, as evidenced by its recurrence in the CGA toolkits, mentions in various CGA marketing case studies, and mentions in sections within the CGA education and outreach best practices. It's time social media receives its own section so all members in the damage prevention industry can fully benefit from not only these case studies and toolkits but also an industry-recognized strategic framework, grounded in research and real-world use, to help reduce damages by 50% in 5 years.

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**references**

811 Centers and Industry Professionals:

The One Call Concepts creative team has been actively implementing the proposed social media best practices for their clients (list below). Insights have been gathered from these various 811 centers and various documented examples of these implemented practices can be referenced in documents such as the GSOC Content Calendar 2021, KS811 811 Day 2021 Campaign Review, LA811 DIG THIS Campaign Review, NY811 811 Day 2020 Contest Results, and NY811 811 Day 2022 Contest Results, which provide specific instances of aspects of the best practice and illustrate successful social media engagement within the 811 industry.

Reference organizations include but are not limited to:

Montana 811

Gopher State One Call

Miss Utility

New Jersey One Call

Hawaii 811

Louisiana 811

Oregon 811

Miss Utility of Delmarva

Kansas 811

Kentucky 811

Nebraska 811

North Dakota One Call

New York 811

Kootenai County 811

CGA Toolkits and Campaign Case Studies:


CGA members have created and executed successful campaigns that utilize social media as a pivotal component of their success. These toolkits and case studies offer real-world examples of how social media can be effectively integrated into damage prevention initiatives.








Examples include campaigns such as "811 Corn Maze," "Greer Commission of Public Works Case Study," and "Marathon Pipeline 811 Facebook Live Event."


These references collectively support the rationale behind the proposed social media best practice, drawing on existing practices, industry initiatives, and successful implementations to reinforce the importance of incorporating these strategies into the industry's best practices manual.


<b>Name</b>	Grace Engstrom, Kurt Klenzman, Jim Holzer
<b>Created</b>	01/24/24 2:58 PM
<b>Affiliation (Company or Organization)</b>	One Call Concepts
<b>Phone</b>	
<b>Email</b>	<a href="mailto:gracee@occinc.com">gracee@occinc.com</a>
<b>Responded to Submitter</b>	

Changes made by [web-form@smartsheet.com](mailto:web-form@smartsheet.com), [automation@smartsheet.com](mailto:automation@smartsheet.com)

 9 attachments added

-  [811 corn maze \(Highlighted\).pdf \(429k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [NY811 811 Day 2022 Contest Results.pdf \(973k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [8-12 Social Media Strategy Best Practice.pdf \(111k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [Marathon Pipe Line 811 Facebook Live Event Overview \(Highlighted\).pdf \(454k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [NY811 811 Day 2020 Contest Results.pdf \(998k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [LA811 DIG THIS Campaign Review.pdf \(1M\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer
-  [Greer Commission of Public Works Case Study - FINAL \(Highlighted\).pdf \(553k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer

 [KS811 811 Day 2021 Campaign Review.pdf \(990k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer

 [GSOC Content Calendar 2021.pdf \(124k\)](#) added by [web-form@smartsheet.com](mailto:web-form@smartsheet.com) on Row 1: Grace Engstrom, Kurt Klenzman, Jim Holzer

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