

OSBGE RETREAT SUMMARY

February 6, 2010

The Association Center, Conference Room A, Salem, Oregon

9:00 AM to 1:00 PM

Members Present

Richard Heinzkill, Public Member
Chris Humphrey, RG, CEG, Board Vice-Chair
Dr. Vicki McConnell, RG, State Geologist
Dr. Stephen Taylor, RG, Board Chair
Rodney Weick, RG, CEG
Mark Yinger, RG

Staff Present

Susanna Knight, Administrator

I. Welcome and Introduction: Chair *Taylor* convened the retreat at 9:00 AM and distributed a document titled **Program Notes**. The purpose of the retreat as stated in the Program Notes:

Develop an action plan and RFP for contracted technical writing services to update existing OSBGE “guidelines” documents.

II. Approval of Agenda: *Taylor* stated that the goal of the retreat was to review the three Board guidelines and the White Paper. *McConnell* offered that there are two other Guidelines on the Board’s web page. *Taylor* responded that the Board is hosting those Guidelines.

III. Retreat Objectives: *McConnell* asked that the Board include a discussion of how often these guidelines should be updated. *Taylor* added one additional point to the objectives:

D. To affirm a revision timelines for the reports.

IV. Organizational History of Report Guidelines: *Taylor* asked each participant to provide any historical information about the Guidelines.

- ✓ Knight stated that the Engineering Geology Guidelines (EGG) are dated May 8, 1990 but she did not know the history of its development. In 1999, the Chair indicated that the EGG was in need of updating. Knight offered that the Hydrogeology Report Guidelines (HRG) were completed in June of 2005 and developed in response to some poor quality reports reviewed in the compliance process. Subsequently, the Board observed that since guidelines existed for both engineering geology and hydrogeology, guidelines should also be established for geology reports. The Oregon Geology Report Guidance (OGRG) draft was completed in March of 2008 but not posted on the web or distributed. Knight understood that the Professional Practices Guideline (White Paper) was developed as a tool for the public to understand the various areas of practice.
- ✓ *Heinzkill* stated that he was here to listen and learn and that these documents were already in existence when he was appointed to the Board on 4/4/2008.

- ✓ *McConnell* said that the EGG predates all Board members and she was thinking that DOGAMI folks were involved in writing the documents as it is 20 years old. It is not the best management practice now which is why she inquired about revision schedules for the documents. She offered that she was peripherally involved in review of the other two guidelines. She suggested that the Board needs to locate a scientific writing geologist. The HRG does not need so much review but whenever other agency statutes are referenced, then updates would have to occur. The OGRG is incomplete as it has nothing about geochemistry, geochronology, etc. AIPG does have guidelines.
- ✓ *Humphrey* reported that before he was on the Board he was asked to help with a revision of the EGG and that revamping started about the time that the Memorandum of Understanding with OSBEELS was developed. Nothing was ever completed. He confirmed that the HGRG looks good but he recalls that the Board stopped with approving the OGRG asking “*what are we doing here?*” He did not see it as a bad report, just a question as to why it was being done.
- ✓ *Yinger* stated that never would a hydrogeology report be prepared that includes all of the HRG. He read some gross understatements.
- ✓ *Weick* said that while serving as a Technical Reviewer in 2002, he was trying to determine the standard of care and there was no standard against which to measure a practitioner’s work. He supported that there is a need for the guidelines but their purpose and intent? Perhaps to provide guidance to reviewers but it needs to be clear that project work scopes vary for each project.
- ✓ *McConnell* noted that the two coastal guidelines are very skeletal but they were developed because coastal geomorphology requires a different geotechnical review and because of the frustration of planners and governance.
- ✓ *Taylor* informed the Board that he voted on the HGRG and attempted to edit the OGRG. He observed that the Administrator sees a need to do something with these guidelines.

Taylor directed a follow-up question one more time:

Is this important and should the Board spend the money?

- ✓ *Taylor*: Yes; cultivates best practice.
- ✓ *Knight*: Yes, allows a reference point for Technical Reviewers.
- ✓ *Heinzkill*: Yes; anxious to see the outcome of this so move ahead.
- ✓ *McConnell*: Yes, but there is a frustration about knowing if the Board is producing something that is being used. An assessment tool would be good.
- ✓ *Humphrey*: Yes, but initially wanted to throw out guidelines; perhaps reduce the scale; essential reorganization to be useful.
- ✓ *Yinger*: Agree that the Board should continue today, but he is not so sure about the mention of spending money. Seems to be confusion between best practice and practice of geology; opposes the HRG statement indicating that this is what a good report must contain.

- ✓ *Heinzkill*: Yes, move forward to end up with a document with minimum industry standard.
- ✓ *Weick*: Yes.

V. OBJECTIVES: KEY MANTRA: WHAT WILL THEY BE USED FOR?

Taylor moved the Board into a discussion of the key words and phrases. The Board talked about minimum standard versus recommended standard versus suggested standard.

- ✓ *Yinger* had a problem with minimum as the Board expects registrants to perform to the minimum as a registrant has met the minimum by completing the registration process.
- ✓ *McConnell* offered that the Board is trying to help industry to be aware of best practices. She directed the group to ii of the HRG where the purpose it outlined.
- ✓ *Heinzkill* offered that a registrant may pass due to minimum competency but may not practice at a minimum.
- ✓ *Humphrey* added that if the Board is going to put something out there, it must relate to the Board. Is the intent to educate the public on practice, general standards, or apply to complaints? This question relates to key words.
- ✓ *Yinger* suggested that if the HRG represents minimum standards, a client could say “you did not do this and this and this”; supports the BEST PRACTICES, as this acts as an aid to registrants.
- ✓ *Weick* asked if it is setting a stage of expectation.

Taylor then posted the following list of words on the white board: community, best practice, industry, standards, minimum, encourage, Board, guidelines, recommended, accepted, suggested. The Board discussed: suggested vs. recommended vs. accepted. Through an elimination process, the following key words remained: community, best practice, industry, standards, Board, guidelines, minimum.

Taylor then asked each member to write a statement that incorporates all of the words. The statements were compiled and distributed and the group worked through each statement discussing the up and down side. They agreed that minimum and best practices would not work. After going through all suggestions, the group settled on the following:

The purpose of the EGG/HRG/OGRG guidelines is to encourage best practice in the industry.

Taylor offered that his gut instinct is that the guidelines resulted from poor reports. The guidelines should focus on the basic framework of a report. *McConnell* cautioned that although some of the HRG might be too prescriptive, let’s not go too far the other way and be too general, but somewhere between a Table of Contents and a textbook! *Taylor* summarized that the group concurred with Report Guidelines for topic areas of Geology, Hydrogeology and Engineering Geology.

The Board discussion then continued with the **objectives of use**.

- ✓ *Weick*: establishes best practices to protect the public.

- ✓ *Yinger*: used by practitioners & regulatory community & Board; do not establish as a standard; do not establish as a standard to give Board more leeway; not really for citizens/lay people.
- ✓ *Humphrey*: focus on practitioners; outreach to practitioners to help improve reports.
- ✓ *McConnell*: Board is the author so it is not for the Board. For the practitioners and reviewers of complaints; not for consumer. Planning communities have adopted so planning community is not the “public”.
- ✓ *Heinzkill* referred the Board to OGRG II, Guidance Purposes 1) assist report writers in producing documents that meet professional standards; 2) provide planning tool for geologists to use in designing and crafting quality geologic reports; and 3) provide a guideline for the Board for use in reviewing geologic reports during the usual business of administering the rules and laws of the State.

SUMMARY of Guideline Discussion:

- 1) Guidelines *not* for the consumer/citizens.
- 2) Designed as outreach for practitioners.
- 3) Outreach to regulatory community.

Additional Discussion:

- ✓ *Humphrey* stated that Guidelines cannot be used in enforcement cases.
- ✓ *Taylor* offered that compliance is based on OAR and ORS. He might use the guidelines as a tool along with texts, experience, etc.
- ✓ *Weick* said that he would look at the guidelines as a resource, e.g. one of many tools in evaluating a compliance report.
- ✓ *Yinger* suggested that 3 be left out in OGRG ii. The Board cares about the quality of the reports, not about using guidelines as it administers the rules and laws of the state.
- ✓ *Humphrey & McConnell* agreed that technical reviewers should not reference guidelines.

The following boiler plate was developed to be used for each report:

- 1) *Assist geologic report writers in producing documents that meet industry best practices; and*
- 2) *Provide a tool for registrants to use in designing and crafting quality geological reports.*

VII. Action Plan Development D. Technical Consultant Profile:

- ✓ *Heinzkill* offered that the Board needs to find a geologist as an RFP would not get the Board what it needs.
- ✓ *McConnell* stated that the Board must establish a target of the person and a BIG peer review process.
- ✓ *Humphrey* suggested a person like the lead on the HRG and OGRG; reluctant to do an RFP for a geo consultant.
- ✓ *Yinger*: do by committee and then hire a technical writer to review the final document.

- ✓ *Weick*: if something is in place by June 30, that would be remarkable; hire someone to lead this; need volunteers involved, but someone to herd.
- ✓ *McConnell*: maybe the Board just needs a technical writer to provide input to the current documents (hydro, geo).
- ✓ *Humphrey*: use OGRG as the starting point.
- ✓ *Taylor*: Use panel to write? Use panel at end to review?
- ✓ *Weick*: practitioner knows content.

McConnell departed at 1:18PM.

Additional discussion followed suggesting that the Board is looking for “one of our own”! The person working on this project must know geology and be a quality writer.

The retreat concluded at 1:30 PM.

Before departing, *Taylor* prepared and distributed via email a concluding document for the March 4, 2010 Board meeting.

Summarized by Susanna Knight, Administrator

The Summary Notes of the February 6, 2010, Board Retreat were approved as presented at the March 4, 2010 quarterly meeting of the Board.

Respectfully Submitted,

Susanna R. Knight