



Standards Oversight Council (SOC)

Developing effective technical standards that protect Wisconsin's natural resources

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1072 Horizontal Directional Drilling Standard Team

MEETING NOTES *DRAFT*

Tuesday, March 31, 2020 ▲ 9:30am – 11:30am ▲

Online Meeting

9:30 Welcome & Check-In (Team)

Goal: Welcome and review meeting objective. Share and discuss new work conditions.

Attendance: Kate Brunner;

Team: Kim Gonzalez (Team Leader); John Edwardsen; Brad Eifert; Matt Fehler; Mike Hackel; Dana Halverson, Susan Knabe, Elliott Mergen, Lance Newman; Geri Rademacher; Abby Williamson

Absences: Ann Nye

Guests: none

Nearly all the team is working from home or otherwise has new distractions with the COVID19 sheltering in-place requirement in the state. In response, we are holding this meeting remotely via computer and phone with GoToMeeting software. This meeting is going to quite different than we thought when this team last met and we'll use this opportunity to see if remote meetings are a productive use of our time. Since we aren't in the same room to collaborate, it will be shorter than previous meetings.

Team attendance is high today and no issues are raised related to the ability to participate; however, if anyone on the team has new challenges that arise to take care of yourself or family, please communicate your needs to Kate or Kim.

We've previously outlined some of the categories of risk, and created lists of practices that might identify or mitigate risks. The **goal** of our meeting today is to check-in with each other, and try and make a bit of progress on practices appropriate for the minimum and maximum risk projects.

Notes Review

Goal: review and approve 2/13/2020 draft meeting notes.

Draft meeting notes were emailed around to the team for review and comment.

- Kim asked for clarification on **Geology as a Risk Factor**—additional text will be added. At the last meeting, the team discussed that geology on its own is not a risk factor and that it was often discovered much later in the process rather than the planning phase (other than limited projects that had geotech surveys). Team also discussed that geologic issues were often both discovered and overcome in the field by adjusting depth of HDD or using smaller diameter.
- No other questions or comments on the draft 2/13 minutes were mentioned by the team.
- Kate will post online as final within about a week.

Most of the Action Items from our last meeting (2/13) were completed. One Action Item remains open, though it is underway:

- **Geri** – look into what wetland/waterway quality information is available and clear on the DNR Surface Water Quality Data Viewer. Though the Surface Water Data Viewer doesn't have the best resource quality data to start with, Geri and Kim met with a DNR stream biologist and got an introduction to an available tool, the water condition viewer (<https://dnr.wi.gov/topic/surfacewater/wcv/>). She and Kim are working to find a DNR contact they can consult with to determine what existing data available through the water condition viewer might be most relevant for our project; they'll get back to the team with updates when available.

Survey of Practices for Bore Size Risk

Goal: Review results of the team poll of practices for different bore diameters and bore lengths.

At previous meetings the team came up a list of the key risk factors and a list of practices that might be implemented on an HDD project to mitigate those risks. We looked at the maximum and minimum risk projects and what practices are appropriate on those ends of the spectrum. Then, at our last meeting, we started to think about tools we could use to marry the risk and appropriate practices together.

As a first step to whittle down some priorities and dividing lines, we created a survey last week to try to find the commonalities and see if there were obvious categorization in the practices. This just scratches the surface and sets aside the combination of risk factors, and now to apply this [what the decision tool might be (some sort of matrix, flow chart, scorecard)].

Kate shows a spreadsheet on-screen with compiled results of the survey

- Reminder: 1=never, 5=always, 3=sometimes
- There are averages to identify where the overall team landed but this is not to discount any of you who had opposing viewpoints. Standard deviations, max and min help identify where we had most similar opinions, or most different opinions.

- The results on-screen have practices emphasized with larger text where we had either the most least agreement or the most agreement.
- Team had **good agreement** in some areas--things like geotech investigation, geophysical investigation, generic frac out plan, pre-construction meeting.

There are some practices that had widely different answers in the team survey. We start team discussion there, to identify if there's something more to clarify or define to achieve greater agreement.

1. Desktop existing utilities – The few who rated this as “Never” indicated this was due to:
 - a. There is concern over what utilities provide this information to outsiders or how to access.
 - b. Some aren't easy to find like communications utilities (Charter?).
 - c. The term “desktop” was confusing and some do an investigation of existing utilities via interviews and locating. Digger's Hotline has a “planning locate” service for this purpose; it's on a slower timeline than for excavation.
 - d. By renaming this practice to something like “Review existing utilities (e.g., existing maps, interviews, Digger's Hotline [planning locate])” team members were able to agree to include this practice
2. Rather than continuing through the list and focusing on the practices that need greater agreement, the team next discussed whether both bore diameter and length should be incorporated into the size risk.
 - a. Previous meetings the team discussed using fluid volume, though this was discounted. Rig size was also considered, though achievement of spec'd distance or diameter impacted by soil and rock conditions. Bore length may have greater importance than diameter and this could be represented in identifying relationship of diameter to length in the overall size risk.
 - i. The size risk could be considered in an X-Y graph of diameter to length and risk be instead established as combination of both.
 - ii. Size-related risk could also be presented as a ratio of length to diameter.
 - b. The steps to identify appropriate practices would first be to look at the wetland/waterway resource quality, then sizing risk, then geology.
 - c. There may need to be more dividing categories rather than the max, min and middle sizes, though no specific additions or changes were defined (yet). The team discussed the max and min size breaks early on, though acknowledged there may need to be different breaking points to the size categories.

Plan of Action (Kate, Kim)

Goal: Review action items and agenda items for next meeting (April 22, 2020, also remote).

With the COVID 19 shelter-in-place requirements, we all have more distractions, and we now know this will be at least another month of this upheaval. Let Kate or Kim know if you have thoughts on how to proceed productively, or if your personal or work or health situations change such that you cannot participate in an upcoming meeting.

Next steps for April 22 (and beyond):

1. Are there changes to the size dividing lines? (diameter 8" and 24", length 550' and 1500')
2. How can the length and diameter be combined to consider overall size risk?
3. Identify what are the appropriate practices for the different risk categories. How many categories are there in these groupings of practices?
4. Continue discussion toward developing a communication tool (decision tree, matrix, flow chart, scorecard, etc.) to identify which practices are appropriate for your project? Is the team's initial approach still the best option when medium items are also included?

Parking lot for later discussion: (including those from previous meetings)

1. Provide information on what resources to use and where to find them (like DNR's SWDV and NRCS soil survey).
2. Clarify requirements on medium risk projects – definition (and is it one medium category, or should we have a gradation of multiple categories)?, practices, drawing lines in practices.
3. Itemize what should be in a Frac Out Plan and a Spill Plan.
4. Clarify requirements for projects that have multiple stream crossings or different quality resources.
5. Revisit use of bore length as a risk criteria – try to better manage temptation to create projects that avoid requirements by working just under length thresholds.
6. [ADDED THIS MEETING] Pilot hole. 12.75" diameter pilot is often used, then reaming tools used to increase diameter; pilot and reaming tends to be when frac out occurs. Utility companies typically wouldn't subscribe means and methods used for HDD, though this could be a consideration.

11:30 End