WISCONSIN STANDARDS OVERSIGHT COUNCIL

Standards Oversight Council (SOC)

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1072 Horizontal Directional Drilling Standard Team

MEETING *NOTES*

Wednesday, May 14, 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, Elliott Mergen, Lance Newman; Ann Nye; Geri Rademacher; Abby Williamson

Absences: Susan Knabe

Guests: None

I expect that we're all still mostly at home with this COVID19 sheltering in-place across the state. We may have found a stride, or we may have even more new distractions.

As in the past, we know that a remote meeting is harder for all of us to focus and participate, though we're trying to keep things moving. You will be muted as a default to minimize background noises if you have something you'd like to add, please unmute yourself and interject. You may also use the Chat Box to let us know you'd like to speak. Team has permission to get into any conversation.

Goal for this meeting: Come away with greater agreement on which practices are size dependent.

For today, we'll focus just on clarifying size-dependent practices. Last meeting we talked a lot about size definitions and we WILL pivot back to that. Kate is maintaining a **parking lot** list of future discussion topics, and the concept of a Size Risk Chart has been added.

Notes Review

Goal: review and approve 3/31/2020 draft meeting notes.

Draft meeting notes were emailed around to the team. No questions or comments on these draft 3/31 minutes. Kate will finalize and post online next week.

Size-Dependent Practices

Goal: Review results of the team poll of practices that are size dependent. Discuss practices with low agreement and identify the sticking points.

Before this meeting, we had an online team survey to identify in the list of practices what was size-dependent. There was generally good agreement identifying quite a few practices that are size dependent. The team will next focus on the pared down list of just 7 of the practices where there was lower agreement.

The team splits into 3 breakout groups to discuss the list of 7 practices. nd come to an agreement on whether each of the 7 are size dependent and offer suggestions for changes to clarify any confusion.

Breakout Groups Report Back

Each of the 3 breakout groups reports back on their team progress on whether a practice is size dependent, and other discussion points related to the practice.

Key points from the discussion are below: (Note, the a, b and c designations are the categories we used to organize the list of practices for better context.)

- This discussion was complicated by trying to discount resource quality; there are always other multiple factors to consider on an HDD project. To help guide the process, some contemplated this as: if you have a really high quality resource, would size matter?
- Do we just need rewording or clarification or is there one or two that are sticking point?

The abbreviated list of practices for which the team had previous disagreement is below. Highlighted items are those that may still need further discussion for full agreement or clarification:

a. Risk Evaluation

1. **Field site walk through (at initial design)**
    - Most thought that yes, this was a size dependent practice.
    - Some thought this step isn't necessarily size dependent, but could be eliminated with a thorough desktop review. Desktop review may differ by site conditions like soils, wetland, etc.
    - Simplest/smallest projects would not require a site walk through at initial design but this would be necessary for larger projects (longer and/or bigger diameter).
2. **Field wetland identification/delineation**
    - Most thought this was not a size-dependent practice. It's only based on resources. If you were to need a delineation, this would be based on whether the project encounters a wetland, not how big the project is.

- Some thought it was size dependent but acknowledged it is more about other factors (permitting, quality of resource, length of project).
- Identification and delineation are different activities—this should be clarified and possibly split.
- Identification of water features is important regardless of size.
- Field delineation more common on longer projects, whether smaller or larger diameter; however, some felt that delineation requirements are based on whether a wetland if found by desktop survey or walk-through, not the size of the project.

3. **Field water quality survey**
   - Full team agreed this was not size-dependent.
   - This is based on resources (waterway and quality) and triggered by the desktop survey looking at resources encountered.

b. Planning

4. **Frac out communication plan**
   - Full team agreed this was not size-dependent.
   - Team discussed that a communication plan typically wouldn't be a separate plan, but would be one section of the Frac Out Plan.
   - Communication plan may require more detail for larger size projects.

c. Construction Phase

5. **Field bore path walk-through with contractor**
   - Most thought this was not a size-dependent practice.
   - Some thought this was a size-dependent practice, with more complete or more parties attending for longer or larger diameter projects.
   - Issues came up regarding **who** would attend the walk-through.
     a. Construction crew should be walking the bore path, regardless of size.
     b. Would environmental representatives also attend the walk-through? Enforcing agency? Utility owner?
   - Not always walking the entire length of bore path, may be the entry and exit locations and talk through other issues (like access for frac out response)
6. **Monitoring and inspections by utility owner or 3rd party (beyond any permit requirements)**
   - Team generally agreed that this was size dependent.
   - Monitoring could change with size, for example recommended for middle size (e.g., 1800-4500' long or >20" diameter), and required for larger projects (e.g., >4500' long).

- There are different needs in monitoring vs inspections. These should be clarified and possibly split. Monitoring by contractor, inspections by enforcing agency.
- Contractor or utility employee often do the monitoring. Monitoring or inspections by 3rd party only sometimes, like a special waterway or resource, but is this only permit-driven?

7. **Recordkeeping/documentation (above and beyond any regulations or permit requirements)**
    - Team discussed that this may be size dependent, but this may not be for the standard to dictate.
    - This would typically be included as a permit requirement and the terms are vague.
    - Utilities may also have in-house requirements for documentation by their contractors (outside of permit or agency requirements).
    - Consider adding as-built requirements for all HDDs, with different level of complexity based on size. More details (CADD, GPS) could be required on larger bores.

Plan of Action (Kate, Kim)

Goal: Review action items and agenda items for next meeting (June 18, 2020).

The 6/18 meeting will also be remote.
To make some progress before the next meeting, we may also ask you to some progress on smaller group collaboration between the May and June meetings. This could be scheduled at the group's leisure.

Possible agenda items for next meeting:

- Still some discussion to conclude the list of which practices are size-dependent and clarify some language on practices. For practices that are size dependent, now review to identify which size conditions where the practice would be recommended or required.
- Size Risk Chart – some on the team identified some different breaks in length and diameter. The team will need to discuss where the lines are draws in creating a combined size risk category (length + diameter).
- We will need detail on all the practices in the standard. Some practices don't need much definition, though other practices on the list need more clarification before the team can discuss when it's applicable. Kim and Kate will discuss off-line and consider a survey or similar input exercise or breakout groups between meetings for team to identify which practices will need further team discussion and explanation.

Action Items:

1. Kate – prepare draft meeting notes with Kim, then send to full team for review and comment. Notes will be approved by the team at the next meeting).

2. Kate and Kim – prepare next meeting agenda and share with team.
3. Kate and Kim – prepare survey or other exercise to identify which practices need further clarification or explanation.
4. Team – participate in survey/exercise/breakout to clarify and explain practices where needed.

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

1. Define the risk categories and establish practices appropriate to each. Continue discussion on developing a communication tool (decision tree, matrix, flow chart, scorecard, etc.).
2. What resources to use and where to find them (like DNR's SWDV and NRCS soil survey).
3. Itemize what should be in a Frac Out Plan and a Spill Plan. Clarify if communication plan should be stand-alone or part of the Frac Out 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. Pipe diameter vs bore diameter – pipe diameter is used in permits, do we need to define bore diameter relative to pipe, or how bundles will work?
7. Pilot hole. 12.75" diameter pilot is often used, them 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.
8. Maintain monitoring throughout the project (e.g., not just the first reaming pass or other limiting factor)
9. Wetland delineation and identification as one practice or two? Identification and delineation are different activities—this should be clarified.

11:30 ***End***