



Standards Oversight Council (SOC)

Developing effective technical standards that protect Wisconsin's natural resources

131 W. Wilson St., Suite #601, Madison, Wisconsin 53703
(608) 441-2677 || Fax (608) 441-2676 || socwisconsin.org

1072 Horizontal Directional Drilling Standard Team

MEETING AGENDA

Thursday, June 18, 2020 ▲ 9:30am – 11:30am ▲

Online Meeting

9:30 Welcome & Check-In (Kate, Team)

Goal: Welcome and review meeting objective.

Attendance: Kate Brunner;

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

Absences: Brad Eifert

Guests: None

Goal for this meeting: Come away with confirmed details for some of the practices.

Notes Review (Kate, Team)

Goal: review and approve 5/14/2020 draft meeting notes.

Draft meeting notes from our 5/14 were emailed around to the team. No questions or comments on the draft minutes, so the draft notes will be finalized. **Kate** will post online within a week.

Breakout Group Reports Overview (Kate)

Goal: Review details for the four breakout group reports. Each will provide details on two practices, allowing time for team discussion.

Breakout groups were successful at the last meeting so we continued with that energy. By working in between meetings we are making progress allowing flexibility with your schedules and time to mull things over.

We had four groups, with 3 people in each group. Each group was assigned 6 practices to detail similar to what we see in a technical standard. Today, we'll hear from each breakout group regarding the progress they made on two of the practices each was assigned.

The purpose of these presentations is to get wider feedback from the full team and move more toward technical standard language. With more complete descriptions of the practices, we can pivot back to pairing the appropriate practices to apply relative to different levels of risk (e.g., flow chart, decision matrix)

A summary of the presentations and team discussions follows:

Green Team Report (Abby, Elliot, Lance)

Field Geophysical Investigation – Use geophysical survey techniques to determine soil boundaries, bedrock, soil moisture, soil type and karst features.

- There was not a lot of experience within this group so exact methods not specified. Ground penetrating radar and electrical resistivity surveys are 2 most frequently used.
- Geophysical survey may not be the best tool for these purposes but would be used in conjunction with other practices. Karst is where there would be bigger benefit, and/or where bedrock would be encountered.
- This would not automatically be required on every project—trigger could be where there is bedrock expected. This is a more rarely used practice and could be a Consideration in the standard (rather than a Criteria).

Site Spill Plan – Create a plan drawing showing location and details of BMPs, personnel responsible for enacting plan, and contact information specific to the site location. Identify all water bodies and natural resources. Identify contaminants (e.g. drilling fluid) and quantity expected to be used on the site.

- This would be the site-specific plan; there is still a generic spill plan for simpler projects. Generic would be general narrative information.
- Site specific plan would have both a drawing and a narrative component.
- “Contaminants” could be a citation an official list of options. Some requirements are already regulated (like secondary containment required over certain volume of fuel) and the spill plan would be for additional requirements beyond the regs (like drilling fluid).
- This site-specific spill plan information could also go in Detailed Bore Plan (Susan/Brad/Mike group practice) rather than a stand-alone plan. There could be just one drawing to serve multiple purposes—the detail in the standard could allow for a combination of practices at the discretion of the user.

Blue Team Report (Geri, John, Dana)

Desktop Survey

- Includes wetland boundaries: How are you going to identify the wetlands?
- Minimum: SWDV wetlands, wetland indicator soils (are wetlands in only using desktop), imagery used to expand the boundaries. Temporary vs permanent impacts.

- These desktop tools would be used to identify waterways of all types.

Field Wetland Identification

- Should be moved to Planning phase, and combined with field water quality survey.
- A delineation would include quality so this team recommended new combined category. New category would be renamed Wetland Quality Identification since typically a “field water quality” review wouldn’t be of a waterway.

Field Bore Path Walk Through – with contractor

- Team had previously discussed 3 walk-throughs at distinct phases: design, planning and construction. This team was just looking at construction phase field bore path walk-through.
- Who attends? Should include representatives of contractor and client sides. Could be contractor project manager, general foreman, superintendent—people involved with doing the work in the field. Size of project makes a difference in how many people should attend since the risk is different. Larger or riskier projects would have more people attend.
- What to cover? Drive through the project area. Identify locations and details of wetland boundaries, endangered species, archaeological avoidance/monitoring. Discuss site complications.
- Summary: Communications are key to success. Representative of facility and contractor together talking about the project in the field should help with implementation.

Pre-Construction Meeting

- Meeting format could follow a standard checklist – we could include an example in this standard. Checklist would be the same regardless of size, though not all topics need deep discussion for all projects.
- Alliant uses a checklist that includes other aspects that may need to be whittled down but could be a starting point. We Energies also has a “template” they use for a full construction project (not specific to just HDD portion of the work).
- This may not be needed for every project (though the field bore path walk through IS). If we list chronologically, this task is usually completed before the field bore path walkthrough.
- Team will discuss which checklist items could be on that list.

Orange Team Report (Susan, Brad, Mike)

Their team looked at the details for the plans and proposed to merge some of the documents into one submittal—either a Generic Bore Plan or a Detailed Bore Plan. Team would need to discuss what are the triggers to change requirement from a generic plan to a detailed plan (Where is the threshold for generic vs site specific? Is it potential env impact, and/or bore size, and/or length?)

Generic Bore Plan

- Suitable for all levels of HDD, a broad range.

- High level summary and lists of information that could be utilized for a complete range of HDDs. This document would contain information like: permitting, env protections, requirements for equipment, training by crew, monitoring requirements, initial frac out management activities, notifications (if any needed), and requirements at HDD completion.
- It would include elements of what team previously listed separately as frac-out, communication, execution, and contingency plans. Generic Bore Plan wouldn't need to include the staging plan (this would be for Detailed Bore Plan, discussed later).
- Keep vaguely worded for generic plan

Detailed Bore Plan

- Site specific plan – much more detail on who, where, when. Narrative form and drawings attached.
- Combination of our previously discussed Standard could include “at least the following requirements....” to identify the minimum.
- Major categories:
 - Permitting – what has been completed by the design team, what needs to be completed by the contractor.
 - Frac-out plan – what are the specific risks on this site, what equipment and materials will be stored on-site ready to go and what resources will be available in an emergency
 - Communication plan – list of who gets contacted and when, all contact information,
 - Staging plan – where is rig, access to the bore area and receiving pit site, show any environmental concerns and how access will be obtained to these locations in case of a frac out
 - Execution plan – how the bore will be completed, type of equipment, personnel, bore tracking, permitting requirements
 - Contingency plan (response plan) – may be vague/generic because the frac out or impact is widely ranging (e.g., degree of frac out, access).
- Team discussed that this could also incorporate spill plan (assigned to another group). Some have the spill plan tied to the full project so it is kept at a higher level to include boring, plowing and trenching.
- Team discussed concept of merging plans together vs keeping separate. Different projects or clients have different approaches.
 - If consolidated into one, this plan could include details on frac out plan, staging plan, execution plan, contingency plan.
 - Some prefer to keep separate (maybe for other needs, like if they also have excavation on the project). Simple projects in particular benefit from pulling in the plans specific to each. For easy bores or low risk, the generic docs would be used.
 - We could allow the user to pull the individual plans in as needed for the project— maintain flexibility.

- Important discussion needed in the future as to: Where is the threshold? What size or what risk (env impacts) would cause this?

Yellow Team Report (Kim, Matt, Ann)

Field Site Walkthrough

- Purpose: incorporate measures to minimize risks (field identified for confirmed)
- Size of project
 - Simple services with basic design may not require this
 - Anything designed will require this
- What to review?
 - Existing utilities
 - Existing infrastructure—roads, railroads, structures
 - Adjacent property and use restrictions
 - Future developments in the area
 - Environmental features
 - Topography
 - Visible geology
 - Slope instability
 - Setup and exit locations for drill
 - Can the exit location support the staging area?
 - Enough room for the equipment to be set up?
 - Areas where site specific conditions impede ability to inspect drill path? If so, ID alternate inspection route.
- Attendees
 - Small jobs: just designer
 - Larger jobs: designer, engineer, environmental, contractors

Reporting – as built, spills, weekly erosion control reports (beyond any regulations or permit requirements)

- Purpose: keep agencies apprised of project.
- As built process depends on the utility company – DNR does not request this currently and would not be wanted routinely in the future. This would be in the Documentation section rather than Reporting.
- Spills – contact DNR, decide if this includes both frac-outs and other fluids, develop guidelines for which frac-outs to report
- Online tracking system
- Construction status reports including overall project status, summary of monitoring, any issues (including IRs) and associated response, and complaints and how they were addressed (FERC Recommendation)
- Document efforts associated with any monitoring that was performed.

Plan of Action (Kate, Kim)

Goal: Review action items and agenda items for next meeting (July 16, 2020).

The next meeting on 7/16 meeting will also be remote. Instead of having the usual 6-hour in-person meeting, we'll again reduce the remote meeting to 2 hours, but expect to develop some group assignments to make some progress before the next meeting. This could be via email or call scheduled at the breakout group's discretion, similar to the assignments you prepared for this meeting. Kate or Kim will email the group with assignments after the meeting.

Action Items:

1. **Kate:** finalize 5/14 notes and post online
2. **Kate:** prepare 6/18 draft meeting notes, **Kim** reviews, then full **Team** reviews
3. **Kim** and **Kate:** develop details for next breakout group assignments (watch for email), then **Team** perform the work for our next meeting
4. **Kim** and **Kate:** prepare agenda for 7/16

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.) for determining which practices apply for a specific project.
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, 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.
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**