



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 NOTES

Thursday, July 16, 2020 ▲ 9:30am – 12:00pm ▲

Online Meeting

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

Goal: Welcome and review meeting objective.

Attendance: Kate Brunner;

Team: Kim Gonzalez; Matt Fehler; Mike Hackel; Dana Halverson, Susan Knabe, Elliott Mergen, Lance Newman; Ann Nye; Geri Rademacher; Abby Williamson, Brad Eifert

Absences: John Edwardson

Guests: None

Goal for this meeting: Further update details of the practices and identify which ones to focus future work.

Notes Review (Kate, Team)

Goal: Review and approve 6/18/2020 draft meeting notes.

The draft notes from our 6/18 meeting were emailed around to the team for review. Opportunity provided for questions or comments; hearing none, the notes are assumed final. **Kate** will post on team website in the next week.

Breakout Groups (3 groups)

Goal: Rearrange groups and further discuss and edit homework.

We divide into 3 different breakout groups, mixing up previous groupings to provide input on previous work. Each new group to review and comment on a specific group of practices, focusing on:

- **Content** – Is there sufficient information in the description for the user to understand and have consistency in the practice?
Think: Why? What? When? Who? Where? How?
The purpose of the practice, what the practice involves, when it is implemented,

who implements it, etc.? Teams could also add highlighted text (as what's been started in the drafts) for subjective items related to when a practice is applicable.

- **Bigger discussion topics** – Highlight text that warrants full team discussion, for example, are the details are unclear (either too much or too little detail) or does your team disagree with some part of description?

We'll break out into 3 new groups, tasked with practice clusters generally related to: field, desktop, and plans.

The new groups and practices for today's breakout discussions are as follows:

- **Triangle – Ann, Dana, Lance, Mike** [field practices]
 - Field site walk-through (at initial design)
 - Field wetland ID/delineation and water quality survey
 - Field site walk-through (at planning phase)
 - Pre-construction meeting
 - Field bore path walk-through – with contractor
 - Monitoring and Inspections – by utility owner or 3rd party (beyond any regulations or permit requirements)
- **Star – Matt, John, Abby, Susan** [desktop practices]
 - Desktop survey (SWDV and other readily available tools) – proximity to wetland/waterway resource, resource type
 - Review existing utilities (e.g., existing maps, interviews, Digger's Hotline planning locate)
 - Desktop soil – NRCS soil survey, existing geotech data
 - Field geotechnical investigation (soil borings)
 - Field geophysical investigation (incl. resistivity) – optional
 - Reporting – as built, spills, weekly erosion control reports (beyond any regulations or permit requirements)
 - Recordkeeping/documentation (beyond any regulations or permit requirements)
- **Circle – Kim, Geri, Elliot, Brad** [the plans]
 - Spill Plan (Generic)
 - Spill Plan (Site-specific)
 - Frac-out Plan (Generic)
 - Frac-out Plan (Site-specific)
 - Frac-out – Communication plan
 - Staging Plan
 - Execution Plan
 - Contingency Plan
 - Profile details
 - Annular Pressure Curve (APC)

Groups Report Back (3 groups, 15 minutes each)

Goal: Each group shows redlined edits to previous work; team discussion.

Each group provides a summary of their discussion and identifies which practices are in good shape and don't need much more detail and which practices need more detail or there is disagreement with the write-up. Some questions and edits are documents on-screen together in the meeting. The team will have a future discussion on when practices are applicable.

The following practices were identified as *needing more detail or discussion*:

- Triangle Group [**field**]
 - Field wetland ID/delineation and water quality survey
 - Field site walk-through (at planning phase)
 - Pre-construction meeting
 - Field bore path walk-through – with contractor
 - Monitoring and Inspections - by utility owner or 3rd party (beyond any regulations or permit requirements)
- Star Group [**desktop**]
 - Review existing utilities (e.g., existing maps, interviews, Digger's Hotline planning locate)
 - Reporting – as built, spills, weekly erosion control reports (beyond any regulations or permit requirements)
 - Recordkeeping/documentation (beyond any regulations or permit requirements)
- Circle Group [**plans**] – The details for the various plans are in good shape, though this team wanted to leave open the possibility for the submittal style be at the user's discretion (i.e. a "megaplan" or many individual plans). This topic added to parking lot.
 - Annular Pressure Curve (APC)

Where do We Go Next? (Team)

Goal: Revisit discussion on what would trigger the need for these practices.

Team discusses what can we tackle next to continue progress. We aren't yet ready to resume conversation on risk factors and when practices apply.

The practices descriptions should be refined. The breakout group work identified some practices that are in good shape, others that needed work and clarification.

Some wanted to continue with current groups to complete the work started in the meeting today; however, the team agreed (with very slight majority) that details could

be refined more easily by focusing on individual areas of expertise. **Kate** will put together a system for each team member to sign up for the remaining practices that need work. There may be one person signed up, or a group of 4 people that will need to share and collaborate the document. **Each of these new breakout groups** can work out a system to collaborate and share work. We should try to get these in good shape—less questions and more suggestions for your recommended approach. Groups can still flag topics for team discussion at a future meeting if there is disagreement or options to work out.

Plan of Action (Kate, Kim)

Goal: Review action items and agenda items for next meeting (August 13, 2020).

Action Items:

1. **Team:** respond to Doodle poll for future meetings (Sept. and beyond) by tomorrow. **Kim** and **Kate** to set next meeting dates early next week.
2. **Kate:** prepare system for sign-up so team members can self-identify which practices they'll refine. **Kim** and **Kate:** define the assignments to work on the short list of practices that need work. **Team** to complete homework.
3. **Kate:** finalize 6/18 notes and post online
4. **Kate:** prepare 7/16 draft meeting notes, **Kim** reviews, then full **Team** reviews
5. **Kim** and **Kate:** prepare agenda for 8/13

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.
[DISCUSSION UNDERWAY]
Flexible language to allow for either lots of little plans (spill, frac out, staging, execution, contingency, etc.) or large megaplan. Submittal style at user discretion.
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. [*UNDERWAY*]

11:45 End