



Standards Oversight Council (SOC)

Developing effective technical standards that protect Wisconsin's natural resources

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

DNR 1072 Horizontal Directional Drilling Standard Team

MEETING NOTES

Thursday, August 12, 2021 ▲ 1:00pm – 4:00pm ▲

Virtual Meeting

1:00 Welcome & Introduction (Kate, Amy)

Goal: Welcome, and review today's meeting objective.

Attendance: Kate, Amy, Elliott, John, Brad, Lance, Geri, Abby, Ann, Mike

Absent: Dana, Sue, Matt

Guests: Noah Saperstein (Red Cliff Environmental Dept.)

Objective: Work through final clarification of the text and get the document ready for review.

Notes Review (Kate, Team)

Goal: Review and approve 7/15/2021 draft meeting notes.

- Action items
 - Matt worked with Brad to identify a reference for the HydroFracture factor of safety numbers. They didn't come up with a specific source for the numbers as it is more of an industry rule of thumb. The team adjusted the language on-screen together.
 - **Sue** is preparing draft generic figures of plan view and cross-section. She will email these to the team for review early next week.
 - **Kate**: reach out to the Initial Reviewers to gauge interest and availability. Still waiting to hear back from a couple people--
 - Still need a specific name for an Initial Reviewer at Ruekert & Mielke. Matt will pursue an HDD-specific contact and send Kate details. (already complete!)
- Draft notes from the 7/15 meeting were emailed around to the team. No questions or comments to the draft notes were raised by the team. Kate will post online as final.

Final Review of Draft Text (Amy)

Goal: Discuss key topics for editing identified in the team review of the technical standard. Finalize revisions in preparation for Initial Review.

The revised standard text was emailed to the team for review on 7/30/21 though only very minor input received from the team in advance. Amy had flagged a few items for discussion and the team reviews the text on-screen together. Key points from the discussion:

- **Geri** has some clarifying language to Water Resources section to clarify some details in the references and resource types. She will send to Amy by Monday.
- Statement about striving for greater accuracy for large drill paths is moved from Constructability to Considerations.
- **Geotechnical investigation** - Should a boring be required for all medium sized projects, or just ones where a desktop soils analysis indicates potential concerns or key water resources?
 - The applicability of geotech investigation language is edited together on-screen. The team tries to balance some detail while also allowing for site-specific variability in the investigation. The user would need to use some judgement as to what level of existing data and drilling would be necessary (considering extent and proximity of existing info and anticipated soil variability).
 - **We will pose these questions to Initial Reviewers:** *Is the Geotechnical Investigation section too prescriptive? Are there situations where the geotech investigation is not warranted?*
 - There are no additional maps or databases of geotechnical data to reference. DNR permitted projects that require post-construction stormwater measures typically include geotechnical data, though the user would need to know it exists and request it (although some reports since 2015 is available online). DOT has inventory maps of structures that could yield geotech data, but the user would need to seek out the structure # and then make a specific request to DOT for that project's information. This wouldn't be in the standard itself but could be useful to share in training.
- Team discusses which HDD, Spill, and IR Plan contents are needed up front vs. at pre-construction meeting so we aren't specifying inclusion in a plan if the information is not yet known. Some text is adjusted based on these discussions, including:
 - HDD Plan: Example related to ream diameter increase is removed.
 - HDD Plan: The project staging figure requirement is adjusted to be under key water resources and not every project.

- Minimum Cover requirement is kept as is but the allowance for NOT meeting the minimum cover is removed (under profile detail drawing). The cover thickness mimics Michigan requirements.
- This standard does not apply to service laterals in urban areas—statement added excluding HDD paths <6" diameter and <100' long. **Kate** will make sure **Matt** takes a look at this sentence.
- Team makes some clarifying edits to the glossary to match the usage and intent in the text and remove some relics left over from early team discussions.

Review of Attachments (Amy)

Goal: Discuss applicability tables and figures and make final revisions.

Amy reviews the draft attachments with the team on-screen. No substantial edits are made

Initial Review Process (Kate)

Goal: Discuss Initial Review process. Confirm draft text is ready, or identify remaining steps prior to release to reviewers.

Kate reviews the Initial Review process:

- At the last meeting we selected our Initial Reviews. Kate has made contact to confirm most of them and still has a few so pursue to confirm their ability and interest in the review.
- As a reminder, this Initial Review is just this list of invited experts, and we have 14. Amy will facilitate the group DNR review (this grouping is counted as 1 reviewer in that list of 14), and the rest will be facilitated by Kate. She'll send the Word doc to each of the reviewers with specific instructions. If reviewers have questions, I may ask for help from the team to provide some technical assistance.
- Kate will email the reviewers a Word document with specific instructions, and give the reviewers 3 weeks to review and comment. This is a little longer Kate will then code each comment and merge them into one document.
- The team will then prepare a brief response to each comment and make any appropriate edits to the text. Depending on the quantity and magnitude of the comments, we may split up the responses to address via email, or have a meeting to discuss. In any event the team will be sent the comments and collaborate on responses. If you have questions for the reviewers if the comment isn't clear, Kate can facilitate that.
- After the response to comments and the text is ready, we'll send the revised draft out for public review. This public review is called the Broad Review. This is the review step we post to a variety of listservs and to the Initial Reviewers, and the team should send to friends, colleagues, and contractors. I also specifically

ask anyone that was suggested for the Initial Review but didn't make the final list of 14.

Plan of Action (Kate, Amy)

Goal: Review action items and next steps toward Initial Review.

- **Geri:** Has some language adjustments related to the desktop review. She'll send to Amy by Monday.
- **Kate:** reach out to the final 4 Initial Reviewers that haven't confirmed (Enbridge, MG&E, Advance Construction, and Ruckert&Mielke) to confirm interest and availability.
- **Sue:** Will send figures early next week, then Team to have a week to comment on the figures. Kate will be on vacation week of August 23; Amy will integrate the comments and work with Sue to get the figures ready for Initial Review.
- **Amy** gets document edited and ready for Initial Review.
- **Kate:** When document ready, send to the 14 designated reviewers with instruction and facilitate review. We anticipate a 3-week review time with Labor Day holiday and the large DNR group that will be reviewing.
- **Kate:** finalize 6/9/21 notes and post online
- **Kate:** prepare 7/15/21 draft meeting notes, Amy reviews, then full Team reviews.

4:00 *End* [Discussion complete and meeting ends early, at 3:00]