

Utility Partnering Update

ABC GA Dig Safe Conference

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Why Partnering?

- Helps teams set common goals to improve project results, improve collaboration and communication, prevent problems and manage better coordination during a project.
- And it works.
- It is well-studied by the International Partnering Institute, among others.

Partnering Benefits

- \$1 invested in Partnering = \$114 saved
- Resolve issues and prevent disputes. The average claim in the US costs \$29.6 million and takes 16 months to resolve.
- Achieve greater outcomes in terms of schedule, cost and quality
- Improve accountability
- Identify barriers and opportunities for success
- Gather lessons learned at closeout

Background

- AT has a strong history of partnerships
 - Strategic Priorities Group
 - Operations Committee
 - Tri-Party Conference
 - Utility Partnering
- AT rely on these partnerships to resolve problems

Background

- Longstanding issues with utility conflicts during construction, construction delay and contract claims
- AT decided partnering approach to resolve utility problems
- AT Formed Steering Committee for Construction and Utility Partnering

Utility Partnering Session

What Our Partnership Accomplished in 2016

- To address issues, AT conducted a Utility Partnering Session in March 2016
- Participants included were from AT, CEA, ARHCA, Utility Owners/Operators and other partners (Close to 100 participants)
- Developed a Partnering Charter and Mission Statement
- Ranked top five (5) issues to address industry concerns



Utility Partnering

What Our Partnership Accomplished in 2016

Mission Statement:

“We will partner, using early engagement, to successfully deliver transportation and facility projects in a safe, timely and cost effective manner.”

Utility Partnering

What Our Partnership Accomplished in 2016

4 (Four) TFC were appointed

1. Master Agreements
 2. Early Engagement
 3. Partnering/Communications and Central Point of Contact
 4. Process Mapping
- Each committee had over 20 to 30+ members
 - 4 to 6 meetings were held throughout the 2016
 - 2 reports were finalized and 2 reports still being worked on
 - Very positive, supportive and volunteered their time

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What Our Partnership Accomplished in 2016

Key issues identified by Master Agreements group:

1. Template/Types of Agreements
2. Schedule
3. Cost (cost apportionment, cost estimates and accuracy, breakdown for invoicing)
4. Prime Contractor VS General Contractor
5. Temporary Agreements, Proximity Agreements

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What Our Partnership Accomplished in 2016

1. Agreements

- Develop Master Agreements for each type utility by group (Electrical, Pipelines, Telecommunications)
- Existing MA should be referenced as a starting point

2. Uncertainty of schedules when AT provides green light to relocate

- Engage utility companies in advance prior construction so they know the projects and begin their planning, design, ROW, approvals, etc.

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What Our Partnership Accomplished in 2016

- AT Project Cycles address this issue

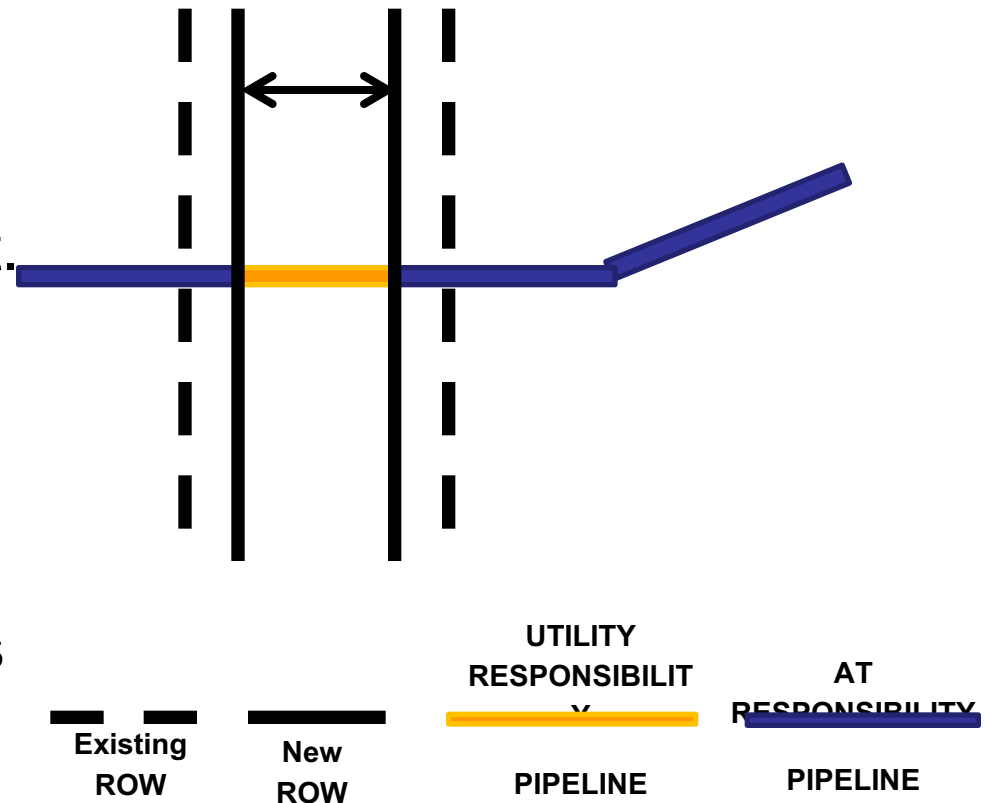
Cycle Start Date		Enter construction year here		Current Date		2015												2016												2017						
June 2, 2015				June 29, 2016		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Construction Season		January 1, 2021																																		
Task	Resource	Start	Finish																																	
Program Development	Investment Planning	6/2/15	2/1/16																																	
Program Scoping	Infrastructure	1/2/16	1/1/17																																	
Program Pick Lists	PSS/Programmin g	1/2/16	6/1/16																																	
Program TOR's	Delivery	6/1/16	2/1/17																																	
Consultant Selections	PSS	10/1/16	5/1/17																																	
Hwy Designs	Consultants	5/1/17	5/1/18																																	
Hwy ROW acquisitions and Utility Designs	AT/Utilities/Cons ultants	5/1/18	5/1/20																																	
Utility Relocates	Consultant/Deliv ery	5/1/20	10/1/20																																	
Tender Prep	Consultant/Deliv ery	4/1/20	9/1/20																																	
Tender Advertising	PSS	9/1/20	2/1/21																																	
Program Construction	Delivery	1/1/21	12/31/21																																	
Lessons Learned	Delivery	1/1/22	4/1/22																																	

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What Our Partnership Accomplished in 2016

3. Cost Apportionment – Current Policy

- Utility company pays within AT's ROW, Dept. pays outside AT's ROW (pipeline crossing scenario)
- Any existing agreements/conditions in permit would take precedence



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What Our Partnership Accomplished in 2016

- Is the current policy supported?
 - Pipeline companies expressed some concerns

Issues:

- Inconsistency of application across the province
- Time and responsibility to find permits
- No permits or has permit but silent of cost responsibility
 - problem negotiating

Actions:

- Form a sub-committee including pipelines to address concerns

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What Our Partnership Accomplished in 2016

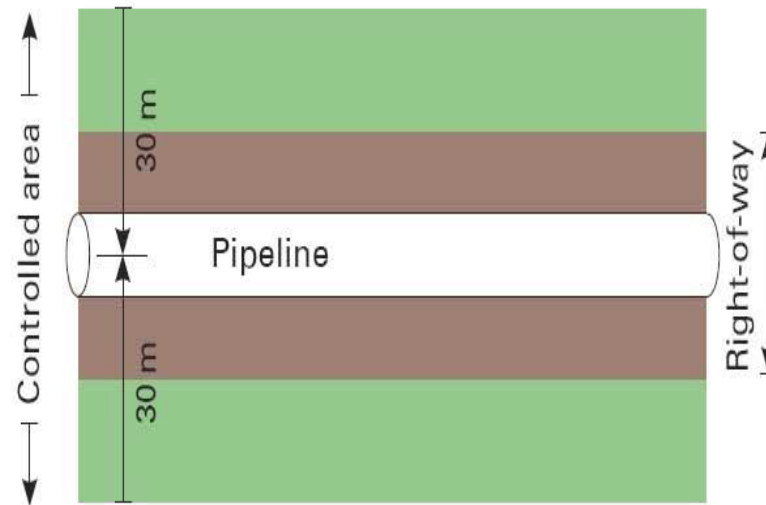
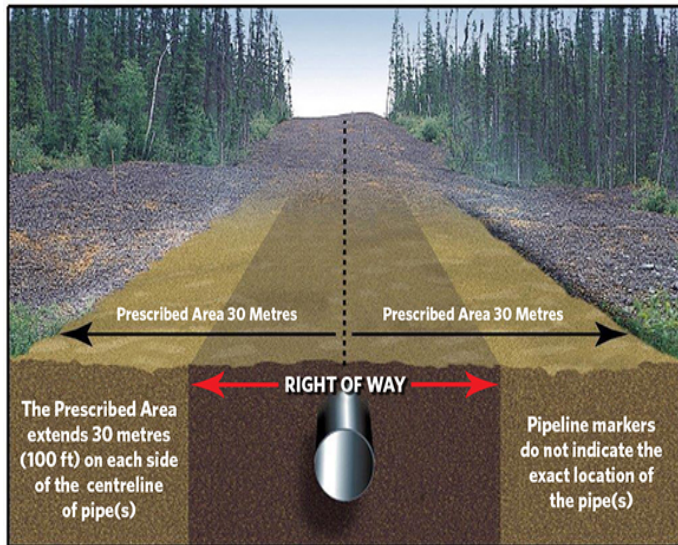
4. Proximity Agreements:

Ground Disturbance - NEB Act and Damage Prevention Regulations, and the Alberta Pipeline Act and Pipeline Rules provide the exact requirements (AER & NEB & CSA)

“disturbance of the earth to a depth greater than 30cm that does not result in a reduction of earth cover to a depth greater than at time of install.”

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What Our Partnership Accomplished in 2016



- **Written consent from pipeline company is required:**
- AER – Ground disturbance activities within a pipeline ROW (Act, section 42) or within 5 meters of centreline of pipeline (Regulations, section 58) in the absence of ROW
 - NEB Pipeline Damage Prevention – Ground disturbance activities in the prescribed area

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What Our Partnership Accomplished in 2016

- AT's contractors/consultants must be aware of the differing regulators and their requirements in relation to crossings and ground disturbances.
- Whether a ground disturbance is occurring or not, AT and its contractors/consultants should (in no particular order)
 - 1) Notify the company to advise what is taking place
 - 2) Place a locate request to Alberta One Call (Both NEB and AER)
- AT/consultant - Request the utility company to provide information/plan during planning stage, including CAD files with disclaimer or screen shots.
- There should be a disclaimer in the Master Agreement re: not sharing confidential utility information.

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What Our Partnership Accomplished in 2016

Key issues identified by Early Engagement group:

1. Timelines
2. Early consultation
3. Consistent communication

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What Our Partnership Accomplished in 2016

1. Early Consultation

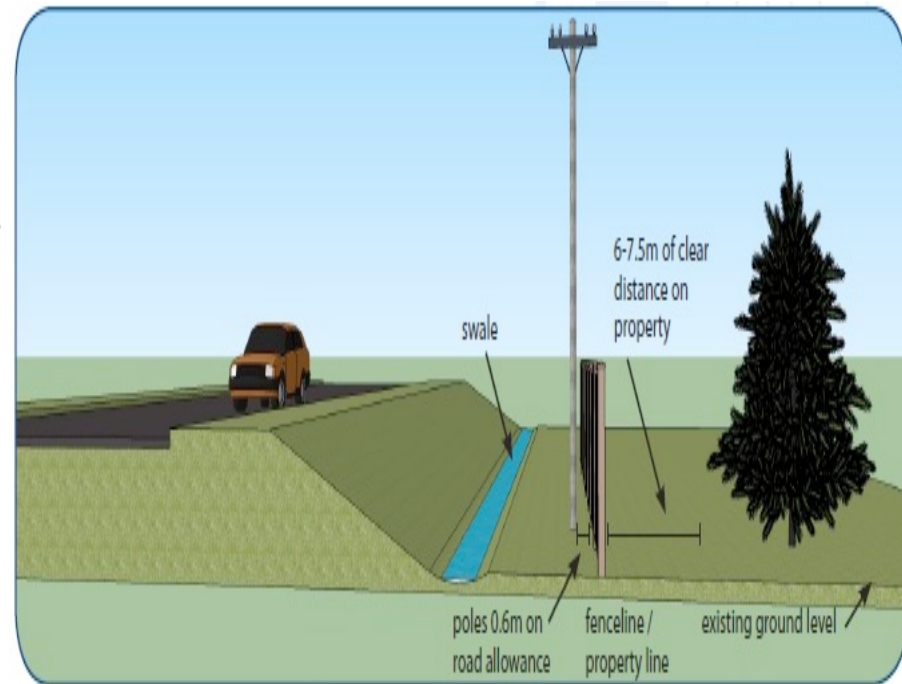
- Involve utility agencies at early & every stages of projects
- Conduct an annual meeting with local utility reps for ongoing dialog at the regional offices
 - Share programs (3 years) and changes from previous year, schedules, establish contacts, etc.
- Meeting in each region expected in May 2017
- Collecting interested utility reps for the regional meetings
- **Please forward names to me if anyone interested to participate**

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What Our Partnership Accomplished in 2016

2. Early Consultation, Land

- Joint effort in acquiring ROW is critical
- Identify additional clearing requirements outside of AT planned ROW during the design (7 to 8m past the P/L)
- Communicate additional clearing requirements during the land owner meetings for the ROW negotiations
- Additional clearing contract to facilitate relocation



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What Our Partnership Accomplished in 2016

3. Early Consultation, Tender

- Potentially no tender until ROW, environmental permits, utility crossing agreements are obtained or confirmed

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What Our Partnership Accomplished in 2016

Key issues identified by Communications / Central Point of Contact group:

1. Communication touchpoints throughout project
2. Single Source of Contact
3. Linking together the Task Force Committees
4. Standardize the permit process
5. Create a utility database

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What Our Partnership Accomplished in 2016

1. Communication Touchpoints:

- Created a Utility Coordination and Communication Touchpoints Flow Chart

2. Single Point of Contact:

- Establish single point of contact
- Work towards an automated system

3. Standardize Permits

Issues:

- Inconsistent practices issuing and tracking permits and inquires
- Permits/agreements are not easily accessible

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What Our Partnership Accomplished in 2016

Solution:

- Research and implement any off the shelf online permit system

4. Single utility database:

Issues:

- No single source of utility database
- Relocate and relocate timing (shallow?)
- Inaccurate or no as-built at all
- Expiry of approved locates timeline

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What Our Partnership Accomplished in 2016

Solutions:

- Research and implement any off the shelf data management system
- Request As-Built Info as part of the development permit update

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What Our Partnership Accomplished in 2016

Process Mapping group:

1. Reviewed the process mapping for the current state
2. Developed mapping for the future state - to relocate utilities ahead of construction and during construction in/c exceptions (e.g. Phasing, fast tracking)
 - Permitting,
 - Planning,
 - Design,
 - Utility relocation,
 - Tendering and Construction

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What Our Partnership Accomplished in 2016

Key Recommendations for Implementation:

- **Present the TFC reports** at the OPS/SPG Committee for acceptance and implementation
- **Retain an expert to develop a detailed plan**
- **Have a dedicated AT utility coordinator** for continuity and consistent communication practices
- **Develop a Steering Committee** to ensure the implementation recommended by the Task Force Committees

Utility Partnering

What Our Partnership Accomplished in 2016

Key Recommendations for Implementation:

- **Measure Effectiveness:** Hold an annual Utility Partnering Conference to obtain feedback to ensure partnering is working as expected and identify improvements as necessary
- **Develop a work plan** identifying outstanding issues for next number of years
- **Develop a training plan** that includes training at all levels and with all partners involved in roll-out of task committee's recommendations

Utility Partnering

What Our Partnership Accomplished in 2017

- Conducted the 2nd annual Utility Partnering Session on March 7, 2017 in Red Deer
- Participants included were from AT, CEA, ARHCA, Utility Owners/Operators and other partners (about 125 participants)
- How the partnering was doing and identified any improvements necessary
- Focused on building the momentum
- Focused on the implementation of recommendations from the 2016 Task Force Committees

Utility Partnering

Next Steps:

- Present TFC reports to the OPS Committee for adoption
- Finalize the Steering Committee and TOR for scope
- Organize the Early Engagement meetings involving the utility reps at the regional offices (Peace, North Central, Central and southern)
- Retain an expert to develop a detailed plan
- Develop training plans and roll-out to all partners

Utility Partnering – Steering Committee

- **CEA:** Michael Field, Dan Dmytryshyn and Marinus Scheffer
- **ARHCA:** Darcy Knight, Eric Schmidt
- **AT:** Mike Damberger, Michael Botros, Shanti Acharjee and David Garcia
- **Utility:** Larry Caouette, Fortis Alberta; Rob Neil and Chris MacDonald, Telus, Guy Hervieux, ATCO Gas; Bradley Nelson and Vikram Jammu, Shaw, Adonis Dichoso, City of Edmonton; Theresa Doolittle, Enbridge; Justian Wylie, Altalink; Michelle Tetreault, ABCGA; Daisy Lam, ATCO Electric; Vanessa Friesen, TransCanada

TAC Guidelines for the Coordination of Utility Relocations, June 2016

<http://www.tac-atc.ca/sites/tac-atc.ca/files/site/doc/resources/rpt-cur-e.pdf>

THANK YOU

QUESTIONS ?

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