

SECURING A SEAT AT THE TABLE

SoCalGas shows the benefits of involving land services in the initial planning phase of a project

BY ANDREW THOMPSON, SR/WA

Years ago, a project manager approached me saying he needed to get in touch with a landowner and get an access agreement to use the landowner's property. What's more, he needed this in less than five days.

As any land services agent would agree, this deadline was nearly impossible. Because he had failed to come to me in a timely manner, his deadline did not give me sufficient time to thoroughly discuss the project with the property owner and establish a relationship. Despite my explanation, I could not pacify the project manager. In his perspective, I was the one throwing a wrench into his project.

This miscommunication is all too common in the world of infrastructure projects. Although a handful of managers know to engage right of way agents early in the planning phase, it seems many are just now realizing that permits and land acquisition can require a lot more time than expected. While design and aesthetics remain a top priority, other equally important aspects—such as property rights—are often overlooked or ignored until the 11th hour. Not surprisingly, the biggest cause of project delays is land access.

Imagine what would happen if right of way professionals consistently got a seat at the table from the very beginning. Imagine if we were consulted and factored into the initial planning phase of a project rather than brought in at the final hour. Instead of imagining, we wanted to make that a reality. This is where the SoCalGas Pipeline Safety Enhancement Plan (PSEP) comes in.

A Focus on Safety

Safety is a core value that SoCalGas and SDG&E demonstrate through action and investment. PSEP is designed to enhance the system's integrity and further protect customers and employees.

PSEP is one of the largest pipeline safety projects in the United States. As required by the California Public Utilities Commission (CPUC), all natural gas pipelines in the SoCalGas transmission system that have not been tested or lack adequate records of a pressure test will be tested or replaced. The current phase calls for SoCalGas to hydrostatically pressure test or replace about 190 miles of transmission pipelines in populated areas



and retrofit over 500 valves to be automatically or remotely controlled. The company's five-year capital plan includes \$6 billion in infrastructure investments. In 2017 alone, it is investing approximately \$1.2 billion to improve the safety, performance and reliability of its pipeline system and infrastructure.

These investments clearly demonstrate the company's commitment to safety. And with its infrastructure plan and funding in place, the company recognized that in order to be successful, a strategic methodology would be critical.



Engaging the Right Players Early On

I was brought in as the PSEP Land Services Manager in March 2013 and tasked with developing processes and procedures for its implementation. I quickly realized that, where a lot of companies fail is in getting the initial assessment of a project up front. A project manager will typically do all the leg work themselves, not knowing the risks involved with land acquisition.

As a land manager, it is my responsibility to ensure that we're in compliance with the laws and not trespassing. It is also my duty to maintain positive relationships with the impacted property owners and not jeopardize the company's reputation. After all, once the project is designed and approved, you still have to build, operate and maintain it. If we upset or alienate a landowner early in the project, we face the potential of negative consequences for the life of that asset.

Under a traditional approach to project management, project teams reach out to land services experts after a project has progressed far along in the design and engineering phase and it is time to begin acquiring land rights. Early on, I took the position that I was not just a real estate specialist who buys property. I was an advisor who could help determine and avoid the risks and potential pitfalls that can happen in the acquisition phase. Not only that, it is my responsibility to make sure we take



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care of the pre-construction access so that we're doing what's right and maintaining the reputation of the company.

Land services is different from other disciplines in that we're also dealing with the human element. Some timeframes may not make sense to a design engineer, but we know the benefits of developing relationships early. For instance, let's say that we're dealing with someone who was upset over a project in the 1980's. Once we recognize this, we might decide early on not to use his property. We can help find alternatives to using his property, and we may even be able to foresee which cases could lead to eminent domain. But all of these benefits are only applicable if we're utilized early on.

As it turns out, many other subject matter experts also felt that their early involvement in the planning process would help mitigate potential pitfalls later on. As we began developing the policies and procedures of PSEP, we decided to engage everyone (including public affairs, environmental, design, surveying and construction) into the early stages and throughout the closeout process.

Reaping the Benefits

Within the PSEP organizational structure, we have had dedicated staff and project teams who were charged with developing the implementation processes. This led to a number of best management practices.

One of the first things we developed was a work process map, which is a tool that allows the project manager to understand which deliverables need to come from which group and when to expect them. This increase in transparency was just the beginning of keeping everyone on the same page.

Early in every PSEP project, we hold an interactive planning session where all the subject matter experts meet face-to-face to draft a proposed schedule and outline the deliverables

for each group. According to Janella Cordova, who currently holds the seat at the table for land services in many PSEP projects, this gives our land team the opportunity to look at what kind of properties we're dealing with. For instance, knowing whether a property is governmental, state-owned or private will change our approach. Being aware of complex or challenging acquisitions helps us to develop a realistic timeline. In addition to identifying risks and how they might impact the proposed schedule, this platform allows everyone involved in the project to better understand our concerns, and we have found that there is much less pushback. Janella points out that as the project progresses, it's much easier to address issues that were already brought up earlier as potential risks.

We feel a great sense of responsibility to educate the project teams on what we do, why we do it and how we work within the confines of property rights, environmental protection and permitting agencies. Similarly, we end up learning about the concerns and needs of the other disciplines involved. Nothing is overlooked because all aspects of the project are presented and discussed at the planning meetings, including base-mapping for survey, the access required for survey, getting pre-approval to go on someone's property, survey monitoring and even environmental monitoring.

By integrating both the work process tool and the interactive planning session, we are able to identify potential risks and create a transparent schedule. And because we are all interacting and communicating in unison, we're working to ensure that no one is holding up the next phase of the project. This is a true show of teamwork.

An Expected Comparison

I always tell both the land acquisition and the permitting teams that we're essentially space planners. We typically notice things that the others don't, such as overhead electrical lines that require cranes be used and could cause a safety hazard during construction. We don't just look at our project—we

look at what's surrounding it. We see what aspects of the land could be used to our benefit, as well as the dangers we need to avoid. Without our team at the table in the initial planning phase, the consequences can have a large and direct impact to schedule and cost.

IRWA International President Jerry Colburn, SR/WA, recalls two particular instances during his time with Overland, Pacific & Cutler, Inc., where he currently serves as Managing Director, Energy & Utilities. In one instance, the skills of right of way agents were utilized early and throughout the project. In the other, they were overlooked. As you probably guessed, the outcomes were quite different.

While working on the 91 freeway in California, there was a design to take out all the parking on an almost brand new building for a California Highway Patrol (CHP) turnout. Acting proactively, the right of way agents looked at the route and were able to shift the CHP turnout up about half a mile. By moving the road back and saving the parking, the revised route ultimately saved millions of dollars.

Unfortunately, the opposite can happen when land and right of way agents do not have a seat at the table. Jerry recalls a time when the team driving the piles for a freeway overpass caused so much vibration that the foundations of the mobile homes in an adjacent park were severely damaged.

As these examples show, the land agent's early involvement can make or break the project budget and schedule. With PSEP projects, we get involved early so that we can determine whether an idea is effective or detrimental to the project and adapt accordingly.

Addressing the Concerns

As with every new methodology, this strategy poses some concerns. The most obvious are costs. This can certainly be more costly on the design side, even after identifying inefficiencies and streamlining the process to match a more reasonable cost. Companies and organizations who



SoCalGas crews work on Line 43-121 North Section 2 in Los Angeles, California.

adopt this method need to be aware that while it is likely to cost more initially, especially with an increased staff, greater benefits in schedule and construction can be expected later on.

Additionally, this model may not fit the day-to-day operations involved with smaller projects. In those cases, we encourage using some of the best management practices that we developed in PSEP, such as the work process map. No matter the size of the project, this change in mindset to involve everyone early on will continue to benefit infrastructure projects for years to come.

A Worldwide Solution

The issue of waiting until the 11th hour to bring in a right of way professional extends far beyond the U.S. In fact, when Jerry Colburn, SR/WA, attended the U.S.-Mexico Natural Gas Summit in San Antonio, Texas this year, he discovered that they face the exact same challenges that we do. Many Mexican pipeline project teams complain of delays because of land access, and they all admit that this could have been avoided with conversations happening up front. Right of way agents are not asked how much the project is going to cost or how much time is needed. They are simply given a deadline and a package.

I am proud to say that PSEP has taken steps to address the problem head on and create new processes that mitigate the potential risks.

In building a project team, we recognize that each discipline has an incredibly important voice. This methodology is not only beneficial for land services. There have been a number of other disciplines—such as outreach, public affairs, environmental, design, surveying and construction—that also reap the benefits of having everyone at the table from the beginning. Above all else, our project successes have proven that even if we're just a cog in the wheel, every role is just as important as the next. ☀



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