

## 2.2.1 Understanding of Requested Services

The cities and counties of Oregon are highly diverse. They range from small farming and coastal communities, to college towns and large metropolitan cities. Although there is much diversity throughout the State, there are several common traits. All local governments are concerned that increasingly hard to find tax dollars are used wisely. They want quality projects built to meet current demands and long-term needs within appropriate schedules and budgets. Local agency public officials and project stakeholders want to be fully informed of project progress; they are highly sophisticated and expect professionalism, responsiveness, and above all, successful project delivery.

The Oregon Department of Transportation (ODOT) Local Government Section (LGS) is charged with supporting our states' counties, cities, and MPO's in developing and constructing state and federally-funded transportation projects. This support is vital in providing policy and program oversight and meeting FHWA and local partner expectations for project development and delivery.

One of the ways, ODOT/LGS supports its customers is to provide access to professional engineering teams qualified to perform the project scoping, design, survey, construction management and other related services through the use of a two-tiered selection process. In Tier 1, ODOT/LGS conducts a qualifications-based evaluation of solicited proposals; establishes a Statewide On-Call list of Consultant Teams, and executes Price Agreements (PA). Under Tier 2, Local Public Agencies (LPA) will identify consultant need, and request additional information or "mini-solicitations" from all consultants eligible to propose. After conducting evaluations, the LPA may assign individual projects or groups of projects to a consultant team.

Currently, it is anticipated that 7 to 10 consultant teams will be awarded statewide PA's to support the delivery of approved LPA projects in, or added to the 2008-2011 STIP. It is also understood that PA's may be amended to include projects included in, or added to the 2010-2013 STIP based on performance, need and available funding.

ODOT/LGS and the LPA's deserve a consultant pool of highly qualified teams capable of performing planning, project management/oversight, public involvement, land surveying, design, engineering, environmental, right-of-way, construction engineering and inspection and construction contract administration for various types of transportation projects, including (but not limited to):

- **Modernization** – Projects that build/expand roads and highways
- **Bridge** – Projects that build/repair bridges
- **Operations** – Improvements for slides and rockfalls; signs, signals, and illumination; ITS
- **Pavement Preservation** – Projects that rebuild or extend pavement life
- **Highway Safety** – Improvements to reduce crashes and make highways safer
- **Bicycle/Pedestrian** – Projects that build or improve sidewalks, bike lanes, and trails
- **Congestion Mitigation/Air Quality (CMAQ)** - Improvements to help remedy air quality issues
- **Transportation Enhancement** – Projects that improve the appearance and function of the transportation system

Project demand far outweighs funding availability and competition for LPA STIP inclusion is extremely fierce. Also with the addition of ARRA funds, projects are moving through the pipeline faster; but have increased the workload of the Regional Local Agency Liaisons to the point that project delivery is becoming a challenge. To increase project opportunities and improve project development and delivery, ODOT/LGS's prepared a 5-Year Strategic Plan in 2008 that characterizes an

organization dedicated to customer-service through collaboration with their local partners. From training to technical support and federal oversight, LGS is determined to develop and deliver ***“the right projects, in the right way, at the right time and within the right cost.”***

As your On-Call Consultant it is not only our responsibility to provide the required services necessary to efficiently deliver a successful LPA project (See Table 1); but to also provide those services in a way that is aligned with the Strategic Plan. Four principal **goals** were identified in the Strategic Plan to improve service and support, these are:

***Project Development Compliance and Consistency***  
*Ensure that local projects are delivered on time and in compliance with state and federal requirements.*

The Lochner Team brings demonstrated expertise in delivering multi-disciplinary projects from design through construction, on or ahead of schedule. We provide experienced project management so that:

- Projects comply with all applicable ODOT, FHWA and LPA standards and requirements
- Quality control processes are enforced
- Timely delivery maintains the STIP schedule

***Project Development Process Speed and Efficiency***  
*Work with local agencies and various ODOT offices to improve local agency success in delivering projects on time and within budget.*

More so today than at any other time, it is critical to deliver high-quality projects faster and cost-effectively. The Lochner Team has significant experience working within compressed schedules and constrained budgets. We take a practical design approach and ensure:

- Continuous collaboration with ODOT, LPA and project stakeholders
- Early identification and solutions to environmental, right-of-way and constructability issues

**Table 1: Requested Project Services**

***Preliminary Engineering Services***

- Project Management
- Public Involvement
- Preliminary Field Surveys
- Geotechnical Investigations, Reports & Design
- Hydraulic Studies and Reports
- Preliminary Design
- Hazardous Materials Assessments
- Environmental Analysis, Documentation, Compliance & Required Permitting
- Right-of-Way Survey, Mapping, Negotiation & Acquisition
- Landscape Architecture
- Final Project Plans, Special Provisions & Cost Estimates
- Bidding Assistance

***Construction Support Services***

- Preconstruction Conference
- Project Management
- Public Involvement
- Contract Administration & Office Engineering
- Construction Monitoring & Inspection
- Submittal/Drawing Reviews
- Field Testing & Inspection of Material
- Central Laboratory Testing (Records Tests)
- “Off-Site” Materials Testing & Inspection
- Prepare “As-Built” Plans
- Construction Survey Control, Horizontal & Vertical Layout & Staking
- Remeasurement of Quantities
- Monumentation
- Bridge Load Ratings
- Project Closeout

***Construction Oversight***

*Work with local agencies and various ODOT offices to ensure the successful construction of local agency STIP projects.*

The Lochner Team designs projects from a construction perspective; conducting on-going, over-the-shoulder constructability reviews throughout the project development. We design

out potential construction issues, and design in innovations that exceed project needs. This provides:

- Delivery of efficient, economical and constructible designs and contract documents that strictly adhere to ODOT standards
- Quick resolution of contract issues and avoidance of contractor claims

### ***Policy Development and Oversight***

*Work with various units of ODOT, local agencies and FHWA to develop, communicate and implement policies related to the delivery of local projects for which ODOT has oversight responsibility.*

A unique element of our team is Lochner's in-depth knowledge of the Local Agency Federal-Aid and Certification processes. Several Lochner staff members were the principal authors of WSDOT's Local Agency Guidelines Manual and instrumental in implementing Certification in that state. In fact, one of our proposed Work Order Contract (WOC) Managers, Al King, PE, wrote one of the first LAG Agreements over 20 years ago. Then, from 1998 to 2003, Al was WSDOT's Operations Engineer, the "owner" of the LAG Manual, providing full environmental, design & construction management and oversight of all local agency federal aid projects statewide.

This experience has been vital to our LPA project success in Washington and will be available to support ODOT/LGS objectives such as:

- Helping local agencies and stakeholders understand state and federal project delivery and program requirements
- Appropriately integrating ODOT and FHWA policies in local project delivery
- Certification of Local Agencies

We believe this added dimension can significantly aid in implementing LAG Agreements in Oregon, and result in advancing both the program and most importantly, project delivery.

In fact, Al is currently acting as the City of Kelso's Project Manager for their federally funded \$10 million West Main Street Realignment project. City staff had significantly changed over the past several years, and the knowledge base to maintain compliance with Certification requirements had been lost. The City, in an effort to protect their coveted Certified Agency (CA) status, and to provide their staff with sufficient knowledge to carry the program forward, selected Al to act as the City's Project Manager. The selection process was very focused on the consultant's knowledge of the federal aid Certification Acceptance program and management requirements. Al, with his broad CA background was a unanimous choice by the selection committee, encouraged by the Region Local Programs Engineer, Ken Hash. Having other CA knowledgeable staff at Lochner available as backup sealed the selection.

Lochner's responsibilities on the Kelso West Main project, acting as City staff, include managing the federal processes to provide selection of the design consultant, the federal aid required paperwork, full oversight and documentation for public involvement, preliminary design, permitting and environmental documents, final design, and construction of the phased improvements. Perhaps its most important responsibility is training Kelso staff during the course of the project. Lochner's first year is nearly completed, and the second year contract extension has been approved by the City.

As your On-Call Consultant we assure you that we understand the funding process/constraints, as well as the project needs and stakeholder expectations of LPA projects and will efficiently deliver upon our performance promises. ***In other words, we will do our part to deliver the "the right projects, in the right way, at the right time and within the right cost."***

Over and over again, our clients tell us that the key to a successful project is assigning an experienced project manager, dedicated to client service and success. As a firm that specializes in transportation services, finding those key project managers has been instrumental to our success in Oregon and Washington. Because we serve public sector clients almost exclusively, ***we have also focused on adding the very best transportation professionals to our staff; many of whom add direct public sector experience as well having served as public works directors, planning directors, and city engineers.*** As a result, we are very familiar with local, state and federal transportation planning, design procedures and guidelines.

## 2.2.2 Proposer's Project Management

### ***Management & Organization Structure***

Services required by the range of local agency projects contained in the STIP and other agency programs are diverse, and require a broad range of disciplines to effectively provide services. With that in mind, Lochner has assembled a team of local and regional professionals to support LPA projects anywhere in the State. Leading our Statewide LPA Team is Karen Reynolds. Karen is the Salem Office Manager and a Vice President of the firm. She has served as the Project Principal on all project since opening the office in 2003 and served as our Statewide Multidisciplinary On-Call Contract Manager. She will serve as the single point of contact for all contract needs.

As a team, Lochner functions as a "Project Management Organization" (PMO). This structure is based on the realization that the proper management of projects is a key ingredient to ODOT's success and ultimately the company's long-term viability. Once a WOC Manager has been assigned, it is his/her responsibility to assemble the

most qualified multidisciplinary team from amongst internal and subconsultant resources. Both the PE and CE resources will be identified at the outset of an assigned project – this allows for constructability dialogue to be continuous and seamless throughout the PE development, and conversely, appropriate PE staff will remain involved during construction in an oversight capacity, to ensure full continuity throughout the project life. As shown by the organization chart on Page 6 a clear chain of command is established from which project issues, communications, and responsibilities are identified and understood from all of the team members.

The advantage of our organizational structure includes the ability to focus on client needs and expectations; and, the allocation of the best-qualified staff and WOC Managers to each particular project. From award to project close-out our WOC Managers will lead the process.

The Lochner Team's approach to transportation project management is also one of singular responsibility for the life of the project. ***Our Managers create and maintain a work environment which fosters innovation, productivity, and responsiveness to client's objectives for projects.*** They are leaders who inspire people to seek excellence and new ideas; they create or facilitate procedures and incentives to encourage innovation and quality in the finished product.

### ***Describe Branch or Satellite Offices Located within the State and Types of Services***

Lochner's office is centrally located in Salem Oregon, and our teaming partners bring additional resources from 27 individual offices located throughout Oregon. Figure 1 identifies the locations of the consultant team's offices, and the services that each office is capable of performing.

**Figure 1: Office Locations and Service Capabilities**

Firm	Oregon Office Location(s)	Service Capability																
		Planning	Roadway	Structural	Civil	Traffic/Signals	Water Resources	Geotechnical/Haz-Mat	Materials/Lab testing	Survey	Right-of-Way	Utility Coordination	Landscape Architecture	Public Involvement	Environmental	Cultural	Air/Noise	Construction
Lochner	Salem	X	X	X	X	X	X				X		X					X
Anderson Perry	La Grande		X	X	X	X	X		X	X				X				X
Angelo Planning	Portland	X											X					
Kittleson & Assoc., Inc.	Portland	X			X	X												
Exeltech	Portland		X	X	X						X			X				X
Vigil Agrimis	Portland, Bend						X					X		X				
WEST Consultants, Inc.	Salem						X											
GeoEngineers	Portland						X	X	X						X			
NW Geotech	Wilsonville							X	X									
Kleinfelder	Portland, Bend							X	X						X			X
PBS	Portland, Bend, Eugene, Coquille		X				X	X							X	X		
BlueDot	Beaverton									X								
Orion GPS	Forest Grove									X								
ROW Assoc.	Beaverton										X							
Marianne Zarkin	Portland											X						
JLA	Portland													X				
Lois Cohen Assoc.	Portland													X				
MB&G	Portland, Scio														X			
ICF Jones & Stokes	Portland, Ashland														X	X	X	
AINW	Portland															X		
CMTS	Portland																	X

**Describe How Subconsultants will be Selected, Utilized and Managed to Complete Projects**

Lochner is familiar with providing project services utilizing large multi-disciplinary teams for on-call service contracts. We have assembled a broad spectrum of subconsultant's with which to select from when assigned a work order. A project organization chart is provided on the next page. Based on the required services for an assigned project, Lochner will assemble the appropriate team of subconsultants that provide the right people for the task at hand.

For each assigned work order, consideration will be given to the following for selection of a subconsultant:

- Project needs
- Required Expertise
- Response Time
- Project Location
- Current Work Load/Availability

Upon selection of the subconsultants, the established project team will be provided a Project Work Plan which provides the guidelines, expectations, and responsibilities for project disciplines. Subconsultants will be engaged in the



project through regular communications by the most appropriate means (direct meetings, electronic communications, video conferencing, phone, fax) and be included for critical work session meetings.

***Describe Methods of Coordinating and Expediting All Elements of Projects to Meet Delivery Schedules without Sacrificing Quality***

Execution of a project effectively requires expertise and proficiency to manage the various project elements. In order to meet delivery schedules, Lochner will apply proven project controls which facilitate early delivery of a project. Specific emphasis will be placed on:

- Verification of Project Prospectus for schedule and budget
- Close collaboration with ODOT and the local Agency facilitates meeting delivery schedules.
- Early identification of environmental permits
- Close coordination with regulatory agencies
- Early identification of utility impacts
- Early identification of right-of-way acquisition needs
- Continuous monitoring of scheduled milestones and critical path deliverables

Effective control of a project's scope, schedule and budget is essential in achieving a successful project. The interrelationship of these three elements largely determines the project's success. Scope creep increases cost and produces delay. Delays increase costs and cause critical dates to be missed. By organizing tasks, managing the level of effort, developing and monitoring a critical-path schedule, and comparing actual cost to planned cost at key milestones, Lochner delivers a quality project on time and within budget.

***Scope Control***

The primary control for scope is the establishment of a clearly identified listing of expected tasks. Also,

regular team interaction keeps staff focused on the work and with continuous communication with ODOT and the LPA Project Manager project issues can be resolved quickly and efficiently.

***Budget Control***

At Lochner we use the Deltek Vision job cost accounting system. Initial project planning will establish the anticipated expenditure of resource time, and be utilized as the baseline for accrued cost comparisons. As project development progresses, the system allows our Project Managers to monitor both direct labor and direct costs associated with each task in real time. This way, deviations are quickly identified and necessary actions taken to avoid critical cost overruns.

***Schedule Control***

Lochner has employed both Microsoft Project and Primavera scheduling software for development and maintaining project schedules. Our project managers are versed in building schedules to the necessary WBS level as appropriate for the project, and utilizing it for continuous monitoring of progress.

Within our "strong project manager (PM)" system, the WOC Manager is given both the responsibility and authority to manage and maintain the task order budget and schedule. Our team believes that our customers are the cornerstone of our business and we stress the importance of this philosophy every day. Meeting project schedule and budget constraints in this time of reduced funding has become an everyday challenge that must be met by each our design project managers.

***Describe Approach to Adjusting Schedules or Adjusting Level of Effort to Meet a Schedule while Keeping Project within Budget***

Project schedules can be affected by many factors, such as environmental constraints, budgetary

issues, or even political influences. The depth and breadth of the Lochner team enables us to effectively adjust assignments/staffing to meet evolving project demands. We have the ability to adjust for increased effort that may be required to meet a schedule, without crossing the threshold of overtime requirements, thereby maintaining budget. Additionally, Lochner's offices in Bellevue and Lacey, Washington can provide additional resources to meet any spike in the demands that may be encountered, with no additional impact to budget.

### **Summary of Quality Control Procedures and Policies**

Our team knows that our success relies upon delivering high-quality products. ***Our staff understands that quality control is not just a review of the final work product prior to its delivery. True quality is a commitment to a continually improving process of ongoing review and oversight.*** Our team is trained and committed to following an established quality control process and plan. This plan contains instructions, key checklists, and policies to ensure that quality products are produced. An audit process by a quality assurance manager is used to confirm that the policies and procedures are being followed and is used to improve upon quality control policies and procedures.

Delivering high quality projects is at the core of our business, and we have consistently provided transportation PS&E packages that have successfully bid with no addendum, and have been constructed with minimal change order requests. Our WOC Managers are responsible to ensure that our proven QC/QA processes are adhered to for all project deliverables, including:

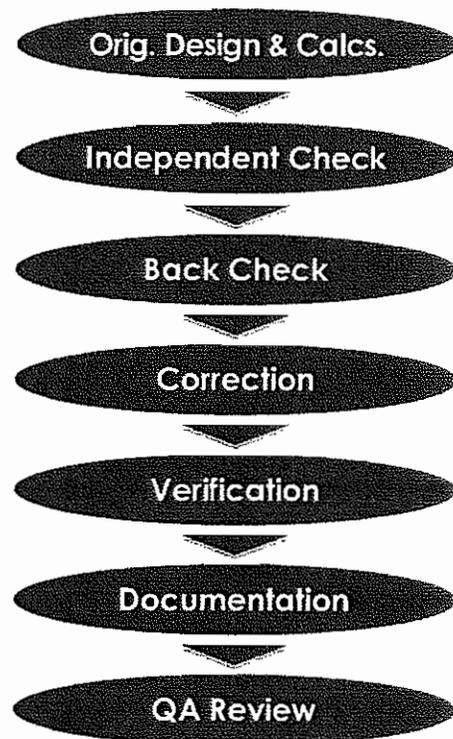
- Well-defined scope and budget with a specific schedule to define distinct milestones with attainable results
- A project specific communication plan

- A document control plan
- Commitment to strict adherence to QA/QC process/checklists

Throughout the life of a project, our WOC Managers will ensure that team members maintain the strict QA/QC procedures of verification, revision, and discussion that entails:

- Original document development
- Independent check of documents against discipline specific checklists
- Conformance to applicable design standards
- CE engineer conducts a constructability review of project deliverables for overall quality assurance
- Back check (designer reviews checked documents)
- Corrections and revisions
- Verification of revisions

**Figure 3: Lochner QA/QC Process**  
Lochner's QA/QC Process



## 2.2.3 General Qualifications

### ***Qualifications and Proficiencies to Complete Requested Services***

As a national transportation engineering and planning firm founded in 1944, Lochner's offices in Oregon and Washington, as well as 15 other states, provide consulting services to 28 State Departments of Transportation and more than 300 municipalities. Our successful business model has been to consummately serve a select group of clients from a locally staffed office; developing strong, lasting relationships in order to advance their visions for the future.

Lochner's western region offices, located in Salem, OR; Lacey and Bellevue, WA are staffed with over 40 professionals experienced in the planning, design and construction management of surface transportation facilities and related services. Combined with the resources of our teaming partners, we will provide over 250 local engineers, planners, scientists, surveyors, public involvement specialists, project managers, construction managers and construction inspectors to efficiently and cost effectively delivery LPA projects anywhere in the state.

Our team offers the following services and is experienced in delivering State and Federal-Aid projects throughout Oregon and Washington.

- Highway & Roadway Design
- Structural Design
- Structure Inspection Services
- Multi-Modal Planning & Design
- Planning & Environmental Studies (including NEPA)
- Water Resources
- Traffic Engineering & Transportation Planning
- Context Sensitive Solutions

- Public Involvement
- Utility Coordination
- Survey and Mapping Services
- Design-Build Services
- Public Private Partnerships (P3s)
- Americans with Disabilities Act Services (ADA)
- Construction Management & CEI Services
- Public Transportation
- Freight & Passenger Rail
- Sustainable Design

### ***List of Projects Performed within Last 3 Years by Type and Location***

A list of projects performed by Lochner and our team members within the last 3 years by type and location is shown on Figure 4 on the following pages.

### ***Project Details of 3 of the Most Recent Comparable Projects***

***US:20 – Pioneer Mountain Loop Rd – Yaquina River Section, Design-Bid-Build, Eddyville, Oregon***  
This ARRA-funded modernization project consisted of realignment for ½ mile of Rural Principal Arterial highway and construction of a new bridge structure over Simpson Creek, along with approximately 1.3 miles of highway preservation (asphalt overlay) work. As part of the project, existing double barrel large diameter culverts on the old highway alignment are removed to provide an open channel for fish passage and enhancing the qualities of the creek.

Lochner was responsible for bridge hydraulics and scour analysis, environmental permitting support, storm water quality design, storm water management plan, traffic control plans, temporary traffic control plans, traffic management plan, and roadside development and erosion control, during the design development.





Design began in July of 2009 and final PS&E documents were delivered to ODOT on schedule in November 2009. Original design contract budget was \$75,851.00. Total invoiced amount through design was \$55,780.00. We are currently under contract to provide CE support services during project construction.

***SR 101 Safety Upgrades – Ocean to Fowler City of Raymond, Washington***

The City of Raymond’s “Ocean to Fowler Project” was a federally-funded local agency safety improvement project, approximately 0.25 miles in length which began when WSDOT planned to install a new signal on SR 101. Impacts from that signal would increase traffic on a local street that served a local shopping and service center as a loop ending on SR 101 at both ends. The existing street was on the east side of the City of Raymond, an urban section of roadway previously constructed to a rural/suburban standard, poorly defined with narrow pavement, narrow shoulders, and lack of access control was creating a safety hazard. Lochner developed a funding package in conjunction with the WSDOT signal project.

The original work was accomplished in 2006, but right-of-way issues external to Lochner’s scope delayed construction. Unfortunately a landowner was recalcitrant in right-of-way negotiations. With the delay, prices accelerated to where project funding was inadequate. At the City’s request, Lochner reengaged with the project in 2008, working closely with the landowner to develop an alternative that fit within the budget and satisfied the landowners’ needs. The City was then able to complete the right-of-way acquisition. Plans and specifications were updated; with design work including utility relocations, curb, gutter, sidewalks and drainage facilities, redesign of access to define and control vehicle movements for safety. We completed the design and took the project to bid late fall 2008.

The City of Raymond is typical of many small non-certified local agencies, population just under 3,000. Its public works project staff consists of two people, the City Engineer and his assistant. ***Lochner’s knowledge and experience with local agencies, federal programs, WSDOT Local Programs and Local Agency Guidelines enabled them to work through federal requirements efficiently and effectively, resulting in project delivery that minimized cost and time.*** Our staff relationships with Local Programs allowed us to pick up the phone and get questions answered and issues resolved often before City staff even had to worry about them. Design budget was approximately \$58,000, and Lochner completed the work with a total expense, including fees, of \$56,661. Each phase of the work was completed within its original schedule.

***Barnhart Road-Airport Road (Pendleton) Connector, Pendleton, Oregon***

Lochner’s Region 5 Partner Anderson-Perry was the prime consultant to ODOT and the City of Pendleton for this \$4.5 million, 4-mile roadway along a new alignment. The objective of the roadway was to connect the Pendleton Airport and Pendleton Airport industrial area with the Barnhart Road I-84 interchange in order to provide an efficient truck access from I-84 to the airport and industrial area. The services provided by AP included project facilitation, full roadway design, environmental assessment, interchange area management plan, construction engineering, and design, right-of-way, and construction survey and staking services. To meet FHWA’s National Environmental Policy Act (NEPA) requirements, AP completed an Environmental Assessment (EA) to document the project’s effects on the natural and built environment. Design was completed in 2008 with construction of the roadway completed in 2009. The design and construction engineering time and materials budget was \$1.5 million; the actual engineering cost was \$895,000.

## 2.2.4 Proposer's Capabilities

### ***Describe Proposer's Staffing Levels and Capacity for the Types of Projects***

The Lochner Teams combined staff available for project work is approximately 250 employees. Based on current projections, and primarily due to the economic climate, our team has approximately 60% or more availability. This correlates to a capacity for over \$31 million billable dollars annually.

### ***Describe How Proposer Accommodates Varying Levels of Work***

Lochner utilizes the Deltek Vision accounting and resourcing software to regular check the status of our work and plan for upcoming projects. This tool, in conjunction with critical-path scheduling, enables us to effectively allocate appropriate resources when needed. With our depth of available resources as a team, there is no limitation to level of assigned work.

### ***Describe How Proposer Accommodates Working on Projects in Various Parts of the State***

Over the past six years, Lochner has successfully completed projects through the OTIA I&II and OTIA III program, from our main office in Salem. Our projects have been located in all 5 Regions; some were even scheduled concurrently and we efficiently delivered through the use of local subconsultants and proactive staff planning.

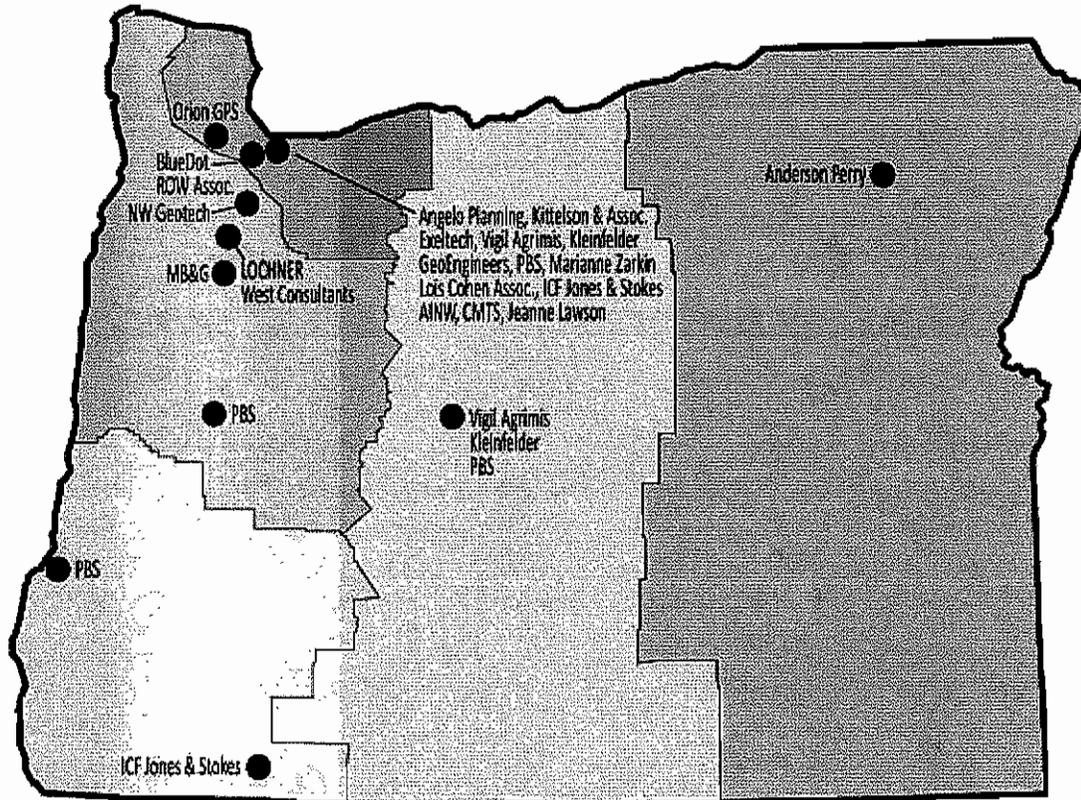
For example, our work on Bundle 304, a bridge replacement project in Grants Pass, Lochner with subconsultant Anderson Perry, and completed the PS&E for the project within budget and schedule. At the same time we were designing the Spencer Creek Bridge at the Oregon Coast. The subconsultant's that we have teamed with on these previous efforts also have offices located around the state, and it is our commitment to utilize their local resources for appropriate tasks, or if appropriate, a local firm may be added to our team; such as a qualified local surveying firm.

***With the support and availability of our design team's resources positioned at various locations throughout the state, we are confident that any assigned project, regardless of location, can be effectively managed, designed, and constructed.***

The Lochner team will utilize available technology to effectively enhance ability to manage projects. For example, Lochner and several of our teaming partners' video conferencing enabled, with this tool alone, we can more effectively communicate with the team, during project development for research, data exchange and communications.

Our familiarity of the state has helped us to provide timely and cost effective services, regardless of the area being served. We have been awarded a Local Agency Bridge Inspection Contract for over 6 years serving the counties of Josephine, Jackson, Curry and Coos; because we have demonstrated our ability to efficiently and cost-effectively deliver within budget and schedule.

**Figure 5. Describe Branch or Satellite Offices and the Types of Services Performed**



Lochner	Salem	Project Management, Planning, Roadway, Structural, Civil, Traffic, Water Resources, Utility Coordination, Public Involvement, Construction Management/Inspection
Anderson Perry	LaGrande	Project Management, Roadway, Structural, Civil, Traffic/Signals, Water Resources, Survey, Utility Coordination, Environmental, Construction Management/Inspection
Angelo Planning	Portland	Planning, Public Involvement
Kittelson & Assoc., Inc.	Portland	Planning, Civil, Traffic/Signals
Exeltech	Portland	Roadway, Structural, Civil, Utility Coordination, Environmental, Construction
Vigil Agrimis	Portland, Bend	Water Resources, Landscape Architecture
WEST Consultants, Inc.	Salem	Water Resources
GeoEngineers	Portland	Water Resources, Geotechnical/Haz-Mat, Materials/Lab Testing, Environmental
NW Geotech	Wilsonville	Geotechnical/Haz-Mat, Materials/Lab Testing
Kleinfelder	Portland, Bend	Geotechnical/Haz-Mat, Materials/Lab Testing, Environmental, Construction
PBS	Portland, Bend, Eugene, Coquille	Roadway, Water Resources, Geotechnical/Haz-Mat, Environmental, Cultural
BlueDot	Beaverton	Survey
Orion.GPS	Forest Grove	Survey
ROW Assoc.	Beaverton	Right-of-Way
Marianne Zarkin	Portland	Landscape Architecture
JLA	Portland	Public Involvement
Lois Cohen Assoc.	Portland	Public Involvement
MB&G	Portland, Scio	Environmental
ICF Jones & Stokes	Portland, Ashland	Environmental, Cultural, Air/Noise
AINW	Portland	Cultural
CMTS	Portland	Construction

## 2.2.5 Project Team <sup>and</sup> Qualifications

### *Extent of Principal Involvement*

Although this type of work and process is well-known to us, Lochner has only provided professional services to ODOT since opening our office in 2003. While we have been very successful in delivering projects under our OTIA I and II Multidisciplinary On-Call and the OTIA III Bridge Program we know that we must impress you with our performance again; therefore our Project Principal Karen Reynolds, will personally be involved with this project as the Contract Manager providing oversight of resources, budget, schedule and quality - in essence maintaining Lochner's performance promise. Weekly, she will meet with the WOC Managers to check project status and provide support as necessary, she will also check in with the ODOT/LGS Local Agency Liaison and the LPA Project Manager throughout the duration of the contract to address any concerns and to learn how we can continuously improve. ***Trust and credibility must be earned, and this requires extra effort on our part, however, this additional effort will not be charged to the projects.*** Karen has served as our On-Call Contracts Manager and/or Project Principal on all projects performed in the local office since 2003.

Lochner is determined to continue earning the respect and confidence of ODOT and our states LPAs by implementing the same project management and quality control/quality assurance procedures that have earned us the honor to work with some of the most progressive cities in the nation, including the cities of Seattle and Chicago.

### *Experience of Project Managers with Similar Interdisciplinary Teams*

Lochner has worked closely with local, diverse and qualified subconsultant firms to successfully delivery interdisciplinary transportation projects throughout the state. In fact, many of our current teaming partners provided their services as part of our ODOT/OTIA I Multi-Disciplinary On-Call. We have successful, long-standing relationships with these firms and can assure that projects delivered under this PA will receive the same meticulous attention to quality, coordination and cost-effectiveness that has earned our teams previous superior performance evaluations.

### *Preliminary Engineering Management*

Each of our Work Order Contract (WOC) Managers are licensed in Oregon and have significant experience managing interdisciplinary teams on similar Local Agency and DOT projects. For example; since joining Lochner in 2004 ***Randy Hinderer, PE*** has managed interdisciplinary teams for bridge and roadway transportation projects including the ODOT Region 2 Culvert Replacement Program and the Dennis Edwards Tunnel Rehabilitation project in Region 1. He also served as the Project Manager for the design and construction of the OR 126: Badger Mountain/Cougar Pass Improvements project in Region 2. These projects included subconsultants providing survey, geotechnical, environmental, ROW and public involvement.

***Robert Munchinski, PE*** recently finished serving as the Project Manager for Lochner's WSDOT/General Engineering Contract (GEC): Mount Baker Region. In particular, this contract provided WSDOT with assistance in meeting the delivery needs of their six-year \$500 million highway construction program in Whatcom, Skagit, and Island counties. This contract included the management, staff, and resources to assist the DOT in the planning,

engineering, design, environmental documentation, right-of-way acquisition, permitting, public involvement and construction of over 25 projects. The Lochner team included 15 subconsultants.

**Project Manager, Al King, PE** experience managing interdisciplinary teams includes serving as the Project Manager for City of Lacey, WA – Gateway Improvement project. The Lochner design provided the City of Lacey with 10,000 lineal feet of new street, and includes regional storm water, wastewater, and reclaimed water system solutions to serve new private commercial development. Due to its public/private agreements, the project schedule was extremely ambitious and required extensive coordination with multiple subconsultants. Phase I design and construction was completed in less than 12 months.

ODOT's July 2009 Local Agency Guidelines – Section C state that its mission includes “Put in place the plans, people, processes and products that will enable the implementation of local agency certification in a timely and cost-effective manner.” We believe that not only will this strengthen relationships and improve communications between local agencies and ODOT (as it has done in Washington), it can also significantly improve project delivery with minimal cost and effort. Al King, PE, wrote one of the first WSDOT LAG Agreements over 20 years ago. Then, from 1998 to 2003, Al was WSDOT's Operations Engineer, the “owner” of the LAG Manual, providing full environmental, design & construction management and oversight of all local agency federal aid projects statewide. As an additional service, we can provide CA assistance to the Local Agency as an integral part of our design responsibilities, thus enhancing not only their ability to perform CA projects, but importantly providing a notable expansion of professional staffing to increase project delivery.

Understanding the perspectives and typical staffing limitations of local agencies is critical to both CA implementation and maximizing project delivery. Al King has been engaged in the CA process for over 20 years from both a local and DOT perspective. He also understands the Stewardship Agreements with FHWA, and can be a valuable resource in smoothing the transition from full ODOT project management to CA Agency project management. His role as the Federal Aid CA/QA Engineer, would be to support our teams WOC managers, providing a point of contact with ODOT Liaison Engineers, working closely with the Liaisons to focus the transition needs as clearly and succinctly as possible, train local agency staff as needed, and provide the oversight to efficiently integrate CA implementation into project delivery.

**Howard Perry, PE, PLS** of Anderson Perry will also serve as a WOC Manager for projects located in Region 5. He has over 37 years of experience and recently served as the project manager and design engineer for the ODOT/City of Pendleton's Barnhart Road project. This 4-mile, \$4.5 million new roadway will connect the Pendleton Airport with the Barnhart Road I-84 interchange in order to provide efficient truck access from I-84 to the airport and industrial area. Project included facilitation, roadway design, environmental assessment, interchange area management plan, land use and right-of-way issues, and construction engineering. The project had both federal and state oversight.

**Jeremy Morris, PE** has 8 years of experience with expertise as a roadway design engineer and construction engineer. He recently served as the project manager and design engineer for Harney County, Baker County, Umatilla County, Pendleton, and Hermiston ARRA Stimulus IR Paving Projects. The total funding for these projects was nearly \$2.5 million and was allocated through ODOT to the local governments. These projects had both federal and state oversight. He also managed an

interdisciplinary team as the project manager and contract administration for ODOT's \$14 million Pleasant Valley Bridge replacement project. This 2-1/2 year project was completed on time, with the engineering services nearly \$400,000 under the \$1.4 million budget. The project included staged replacement of the eastbound and westbound structures with new steel girder structures, rock slope blasting, drilled shaft foundations, and reconstruction of the on and off ramps.

### **Construction Management**

**Mark Sodaro, PE** with Lochner will serve as a Construction WOC Manager. Mark has a diverse civil engineering background that includes design as well as construction management and inspection. He received his Masters in structural engineering from Illinois Institute of Technology and is an Oregon certified Construction Manager and Certified Bridge Inspector. Because of Mark's background in both design and construction, he brings forth a practical approach that has resulted in construction cost savings on many of our projects. He recently served as the project manager for the design and construction support for Lochner's Structural Analysis of Hoover Dam Visitor Center Project. And is the project manager for the firms Local Agency Bridge Inspection Contract.

**Gary Olson** with Anderson Perry will serve as a Construction WOC Manager. He has over 12 years of experience and is certified as a Construction Quality Control Supervisor (QCCS). He recently provided contract administration, construction inspection, and general QCCS oversight on ODOT/City of Pendleton's Barnhart Road project.

This 4-mile, \$4.5 million roadway will connect the Pendleton Airport with the Barnhart Road I-84 interchange in order to provide efficient truck access from I-84 to the airport and industrial area. He also provided contract administration, construction inspection, and general QCCS oversight on the \$2 million North Oregon Street project. Work for this project included grading, drainage, paving, signing, illumination, signal and roadside development to reconstruct North Oregon Street from West Idaho Avenue to NW 1st Street. This project was funded with ARRA stimulus funds and included both federal and state oversight.

**Table 2: Key Construction Staff Certifications**

Mark Sodaro, PE	#42024
Gary Olson	#43665
Gary Limbaugh	#43234

Meeting client expectations, delivering under budget and ahead of schedule, and providing best value solutions are the underlying tenets of Lochner's project management approach. Our project managers receive in-depth PM training with a specific emphasis on communication and coordination to achieve expected results.

## 2.2.6 Cost Effectiveness

### ***Specific Efforts to Ensure Tasks and Deliverables are Completed in the Most Cost-Effective Manner***

The challenge presented under Statewide On-Calls such as this is to respond quickly and effectively to an assignment anywhere in the state. To meet this challenge we have teamed with Oregon firms in each Region of the state, that not only offer complementary services, such as survey, geotechnical or environmental, but also provide the same service, so there is built in redundancy of capabilities on our team.

We are all considered successful when the project is completed on time and within (or under) budget without sacrificing quality. We know the best way to meet this objective is by thorough and thoughtful project planning. We believe that managing the up-front planning process is a critical task. We require that our Project Managers and team members spend time planning the project – even if this time is not yet billable - collaboratively defining project goals and objectives, preparing realistic scopes, schedules and budgets.

Our proposed approach to ensure tasks and deliverables are completed in the most cost effective manner includes:

#### ***Assign the right staff to the project***

Effective project management is critical to a projects success. Appropriate scoping and negotiating a project from the beginning sets the tone for the duration. Our WOC managers are skilled leaders in all phases of project development, including engineering design, quality control, client management, project delivery and project control. They have excellent records of project organization, scheduling, budgeting, and meeting client's needs.

Also, depending upon where the project is located, our teaming partner, Anderson-Perry may take the role of WOC Manager and staff the project, especially in Region 5. They have strong relationships with the LPAs in that Region and extensive experience in delivering LPA projects.

Continuity and efficiency is also achieved by assigning and keeping the same highly motivated people on the project throughout its life, concentrating their time on the project rather than diverting them back and forth between too many projects.

Table 3 demonstrates our experience in delivering projects under budget.

#### ***Maintain consistent design/drafting standards***

Optimization of project productivity comes through the execution of efficient work processes and policies. Setting standards and communicating them to the team at the beginning of the project results in project consistency. Also, we provide well trained and qualified personnel directed by experienced Project Managers that enforce a defined quality assurance/quality control plan as part of the work. Our work mission is to do it right the first time. This minimizes rework and keeps costs down and quality up.

#### ***Ensure continuous communication with ODOT, LPA and Project Stakeholders***

Providing for open communication channels and regular dialogue with all project stakeholders and team members reduces assumptions and keeps everyone informed of the key decisions.

<b>Project Name</b>	<b>Contracted Services</b>	<b>Contract Budget</b>	<b>Actual Billed</b>	<b>Eval. Score</b>
OR126 Badger Mt Pass Lane	Roadway, Environ Traffic Control, Survey, ROW, Geotech, CEI	\$519,165	\$481,056	8
Stg1A S Doug Cty / Louse Cr Bridges Package	Bridge, Roadway, Geotech, Environ, Traffic Control, Survey, CEI	\$1,138,398	\$1,079,567	8
Bundle 204 I-84 Durkee-Pleasant Valley Repairs	Bridge, Roadway, Traffic Control, Environ, CACE	\$480,081	\$312,978	10
Bundle 213 Albany Repairs, I-5, OR228, OR34	Bridge, Roadway, Traffic Control, Environ, CACE	\$665,950	\$360,626	10
US101 Spencer Cr Bridge	Bridge, Roadside Dev. Geotech, Landscape, CACE	\$821,593	\$704,944	8
Reg 2 Culverts Project	Roadway, Environ, Traffic Control, Survey, Geotech, CACE	\$646,345	\$466,732	9

***Efforts to Ensure Travel, Lodging and Per Diem Expenses are as Low as Possible***

Project travel, lodging, and per diem expenses are kept as low as possible through careful upfront planning. Whenever possible, Lochner will utilize local subconsultants to ensure travel costs are reduced. While we have assembled a team that can service the entire state, we will add to our team qualified local partners when/if appropriate. Also we will combine travel with other projects or business reasons when possible to defray added cost to the project. Carpooling will be the norm not the exception and if possible, video conferencing will be used. Lochner is fully equipped to utilize video conferencing and can offer that technology to our clients on a project by project basis.

Lodging costs when necessary will be reduced by booking in advance and using the Government rate as appropriate. Long term CEI/CA project travel, lodging, and per diem costs are reduced by securing lower cost local housing accommodations, assigning project staff located closer to the project,

and, when possible, grouping projects together so costs may be shared.

Lochner’s overhead rate is diligently managed and monitored to be competitive and is within the industry average range for our firm size. However, we are always investigating ways to reduce indirect costs. Also, we use reduced overhead rates for our field staff when on site.

***Specific Methods, Tools, and Processes Used to Develop Service Estimates***

The Lochner team uses a 3-phased approach to prepare service estimates; Zero-Based Budgeting, Recent Unit Costs and Percent of Construction Costs.

First, we utilize the Zero-Based Budgeting method. This method is based on what it will actually take to do the project; hours to complete derived from previous work experience and professional knowledge. From the detailed scope of work we assign an individual with a specific job rate to a particular task along with the required hours for completion of the task. Each task will have a cost

and the total labor cost is determined by the addition of all the required tasks.

Second, we cross check our estimate by applying recent past project unit-costs to current project units. Under this method an estimate is based on the number of units of work performed, for example cost per plan sheet. The advantage to using this method as a cross check is that the costs are based on actual experience, however the reason it is used only as a cross check is that no two projects are ever exactly alike.

Lastly, we compare our total budget against client expectations using the project prospectus and industry standard "percent of construction cost" guidelines.

When all three methods align, we feel we have an appropriate estimate; however if they do not align we look for ways mitigate the differences. Without sacrificing quality, we may switch out staff or look to our teaming partners to do the work.

Also, we can identify contingency tasks early on so that budgets are not inflated for a task that may not happen. We discuss the possible contingency tasks with the PM at scoping allowing more flexibility in the project direction and maintaining good fiscal accountability.

We put our reputation on the line every time we begin a new project. Therefore the development of fair and reasonable estimates is a process we take very seriously. Ensuring that ODOT and the LPA is receiving the value they expect is critical to our success as a service provider and sustainability as a firm.

Lochner values ODOT and our LPA clients. We know you have many consultant teams to choose from, several of which you have worked with for a long time. Relatively new to the market, we can't demonstrate 20 or even 10 years of delivering Oregon Local Agency projects, but we have over 60 years of working with LPA clients (Certified and Non-Certified) across the country.

This knowledge and expertise, combined with our 6 years of Oregon experience; and the extensive experience of our local teaming partners ensure we will meet your project delivery expectations by:

- Delivering high quality projects that comply with all applicable ODOT, FHWA and LPA standards and requirements in a timely manner that maintains STIP schedule
- Providing continuous communication and collaboration with ODOT, LPA and project stakeholders to ensure early identification and solutions to schedule "busting" issues; such as environmental and right-of-way
- Delivering efficient, economical and constructible designs and contract documents that strictly adhere to ODOT standards with an experienced staff capable of performing work anywhere in the State
- Assisting local agencies and stakeholders understand state and federal project delivery and program requirements and appropriately integrating ODOT and FHWA policies in local project delivery

***The Lochner Team creates and maintains a work environment which fosters innovation, productivity, and responsiveness. We are determined to exceed your expectations and ask only to be given the opportunity to demonstrate what our Team can do.***