

TECHNICAL LEADERSHIP TEAMS
QUARTERLY REPORT
April 2009 through June 2009

The Leadership Teams are led by Technical Services for the following major technical disciplines: Access Management - Bridge - Construction – Geo-Environmental – Project Delivery - Right of Way - Traffic-Roadway and include key representatives from Regions and from Technical Services. In addition, the Technical Leadership Team provides technical and engineering leadership for the business. This team is led by Cathy Nelson, Technical Services Manager/Chief Engineer for the Oregon Department of Transportation.

The Quarterly Report is a communication tool to provide an update on key information for ODOT and Consultant staff involved in delivering projects for ODOT.

KEY ACCOMPLISHMENTS

Labor Compliance Review Process: Jeff Gower reported that implementing this process is a significant accomplishment for the Construction Leadership Team. CLT has been working with the Office of Civil Rights to reconcile payroll acceptance. Starting in July 2009, payrolls will now be reviewed quarterly. If adjustments are necessary they will be “caught” and managed more proactively.

ARRA (Stimulus) Project Update: Eryca McCartin, OPL (Office of Pre-Letting), and Michelle Remmy, OPO (ODOT Procurement Office), reported a significant increase in work over last year. The volume has generally tripled from 2008 to 2009 and there are more Local Agency projects not on the bid schedule yet. To help handle the workload, OPL has hired two more temporary staff, including Craig Bennett who is focusing on Local Agency projects. OPO has added four staff temporarily to facilitate processing bids to meet the increased workload. Region staff has also moved very quickly to compile packets and get them ready for bid.

Many of the contractors for the ARRA projects are new to bidding projects with State and Federal requirements. There have been some innovative solutions to help. One ARRA contractor, who has not previously done business with ODOT, hired a sub-contractor who had done business with ODOT to do project QC.

Cathy Nelson, Technical Services Manager, reported that 79% of ODOT’s funding for ARRA has been obligated which exceeds the “50% obligated within 120 days” criteria. ODOT is working to meet eligibility milestones, as

there is a possibility for redistribution of funds from other states in 2010 who don't meet the milestones.

OPO Update: Michelle Remmy, OPO, reported that her staff is very busy, not only as previously reported with ARRA processing, but also with end of biennium contracts, SB 338, and maintenance work.

The Contracting Management Leadership Team (CMLT) charter/structure is being reviewed. A proposed new structure has been outlined where CMLT would look more like other agency leadership teams. The new structure includes a policy/problem solving "steering group" and two working groups – one focused on Highway and the other on Non-Highway business. The overall goal is to provide more focused service. A decision will be made regarding the memberships for these teams, with the goal of kicking-off the newly revised CMLT in July.

Wynnette Gentemann made a presentation to AGC to help let more contractors know about the electronic bidding option. Processing a bid electronically saves approximately 50% over manual processing – something that is very attractive to contractors.

Wynnette presented the concept for electronic plan sets to OTC in March. In the future, "Blue Books" will be produced electronically and plans will be available on CD. A limited set of hard copies of the final accepted bid set may need to be printed for field personnel. This proposal will save money and time for ODOT and for contractors.

Consultant Evaluation Form: Kelly Bruce, Project Delivery Unit, updated TLT on this new process which was implemented on May 1, 2009. The tool was cooperatively developed by ACEC, FHWA, and ODOT. For now it covers A&E contracts and other design related services. It will be tested for 12 months and refined as needed during that period. As the test period unfolds, reviews will be shared with consultants. The testing period also allows users and consultants to adjust to the tool and refine the process as needed. Data gathered will be housed in OPO.

Profit/Fee Worksheet. Michelle Remmy, OPO, reported that the new Profit/Fee Worksheet is posted and official at the following linkat <http://intranet.odot.state.or.us/OPO/formsprocurement.htm#ProcPSK>

This work results from a joint effort between ACEC and OPO. It provides guidance for assigning fees, based on a templated approach and guidelines to take into account project specific considerations and risks when deciding where to land in the fee range. Everyone involved in this collaboration has

grown in understanding of what fees are and the importance of managing profit.

Environmental and GeoHydro Leadership Team Update: Hal Gard and Paul Wirfs provided this update for TLT. Accomplishments included an environmental training program for Local Agencies, contractors and ODOT staff. They also established and received an FHWA Environmental Excellence Award for the first Vernal Pool Mitigation and Conservation Bank in the State. GeoHydro LT has been rotating the “chair” position. This is a great opportunity to learn more about what’s happening around the state, with an added benefit of sharing meeting planning and coordination. Anticipated future work includes developing a Liaison Program Manual and an environmental commitment tracking process.

Training Catalogue Update: Peggy Zahler, Technical Services, distributed copies of the draft training catalogue for review. This is the result of extensive work with the leadership teams to identify core technical coursework to help ODOT staff be successful in carrying out their work assignments. Peggy will incorporate feedback from TLT members, with the goal of having the first iteration of the training catalogue available in July. Peggy would like to have ODOT staff use the catalogue and she will incorporate updates and refinements as needed.

Graduate Engineer Program (GEP)/Summer Intern: Jeff Gower reported that the Highway Division has hired seven new Graduate Engineers who will all have reported to work by June 2009. This year, ODOT has taken a three-phase approach to preparing for and welcoming Graduate Engineers and interns. Phase 1 is a training program for sponsoring managers to learn about the program and their responsibilities. Phase 2 is a formal orientation for GE/Interns on June 17. Phase 3 is Engineering Day on July 15. The agenda includes acknowledging the work of GE/interns and skill building workshops. Sponsoring managers and GE/interns will both attend.

The fourth annual April 21, 2009 ODOT/ACEC Conference, “The Future of Transportation: Costs, Innovations, and Sustainable Systems” was again successful, with 250 attendees and nearly equal representation from both ACEC and ODOT. Conference presentation materials are available at <http://www.oregon.gov/ODOT/CS/Training/ACEC08.shtml> A three-set DVD with presentations by Bill Connerly, Congressman Peter DeFazio’s (DVD message), Doug Tindall, and Scott Bernstein is available. ACEC members can contact Merideth Weber with ACEC-Oregon at (503) 292-2348 to purchase a copy of the DVD. ODOT staff can check out a copy from the ODOT Library and Resource Center, phone (503) 986-3280.

Roadway Conference, April 20, 2009. Ed Fischer, Traffic-Roadway Manager reported that the conference was sold-out this year, with approximately 135 attending. Consultants also were invited to attend. It was a good forum to discuss specialty topics. Break-out sessions were well attended.

ODOT Bridge Design Conference: "What's new in Bridge Design" was held May 21-22. The conference participants and attendees included ODOT and Engineering Consultant Firm Bridge Designers that perform this type of work in the State of Oregon. Presentations from the conference are on Bridge's webpage at <http://www.oregon.gov/ODOT/HWY/BRIDGE/index.shtml>.

Utility Relocation Leadership Team Charter: This charter was approved by TLT in April 2009. Dee Jones and Howard Bergstrom reported that the new statewide team is working very well and very engaged. The plan is to initially meet monthly, then move to meetings every other month. In addition, the new utility liaison, Heather Howe, has started. One future goal is to update the Utility manual (Chapter 10 of ODOT Right of Way Manual).

Bridge Seismic Design Training: Four sessions of bridge seismic design training were held for ODOT and consultant bridge designers in Salem and Portland during April and May to roll out the new AASHTO Guide Specification for Seismic Design that became mandatory in April 2009. The new method involves designing bridges for the maximum movement or deflection expected during an earthquake to ensure the structure has adequate ductility, or the ability to move without major damage or collapse.

New Guidance Documents from Technical Services

| Title | Final Number | Effective Date | Issued by |
|--|-------------------|-------------------------|-----------------------|
| Biology Mitigation Monitoring Standards | NEW GE09-04(B) | 04/01/2009 | Geo- Environmental |
| <p>Summary: This guidance presents standards for post-construction monitoring and management of biology mitigation sites for the purpose of providing consistent data collection, reporting, and tracking of mitigation site success.</p> <p>Contact for more information: Monitoring Program Coordinator, Technical Services, Geo-Environmental Section, Melinda Trask@odot.state.or.us</p> | | | |
| Drainage Markers | NEW GE09-06(B) | Effective 06/01/2009 | Geo- Environmental |

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| <p>Summary: The goal of the drainage marking program is to have a consistent statewide standard for marking culverts less than 20 feet in culvert span. The underlying principle for the placing of the drainage markers is to provide a convenience to maintenance crews, scoping teams and asset management in locating culverts.</p> <p>Contact for more information: Engineering & Asset management Unit manager, Paul.R.Wirfs@ODOT.State.OR.US</p> | | | |
| <p>Project Identification Sign for ODOT Economic Stimulus Projects</p> | <p>NEW TR09-02(B)</p> | <p>Effective 04/07/2009</p> | <p>Traffic- Roadway</p> |
| <p>Summary: The ARRA "Putting Oregon Back to Work" Project Identification sign is intended to advertise ODOT highway construction projects being funded by the 2009 American Recovery and Reinvestment Act (ARRA).</p> <p>Contacts for more information: State Traffic Control Plans Engineer, Scott.M.Mccanna@odot.state.or.us or Traffic Control Plans Standards Engineer, Donald.E.Wence@odot.state.or.us</p> | | | |
| <p>Environmental Monitoring Budgets</p> | <p>NEW GE09-02(A)</p> | <p>Effective 05/05/2009</p> | <p>Geo- Environmental</p> |
| <p>Summary: This guidance describes the types of expenditures currently allowed under the environmental monitoring budgets that are managed by the Geo-Environmental (GE) Section, to promote consistent and accountable allocation and expenditure. The target audience is primarily ODOT staff.</p> <p>Contacts for more information: Monitoring Program Coordinator, Melinda.Trask@odot.state.or.us or Natural Resources Unit Manager, Frances.Brindle@odot.state.or.us</p> | | | |

UPDATED GUIDANCE from Technical Services

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| <p>UPDATED Guidance: The following guidance documents have been recently reviewed and may include minor updates which do not change the meaning or intent of the original document. After review, the guidance is signed, so users can use and refer to the most current guidance. Technical Services reviews guidance periodically to ensure guidance remains current and updated.</p> <p>NOTE: No guidance documents have been updated during this quarter.</p> |
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RESCINDED GUIDANCE from Technical Services

Rescinded Guidance: The following guidance documents have been rescinded since each of these is now incorporated into a manual or other document. The guidance website listed below provides links to where the information can now be found.

No guidance was rescinded during this quarter.

Complete information regarding current and rescinded technical guidance is available @

<http://www.oregon.gov/ODOT/HWY/TECHSERV/>

Manuals from Technical Services: Updated this Quarter

The following manuals have been updated during this quarter.

The complete list of Technical Services' manuals can be found @ <http://www.oregon.gov/ODOT/HWY/TECHSERV/alphanmanuals.shtml> with links to each of the manuals.

| Manual Title | Last Updated | Issued by |
|---|--------------|------------------------|
| <p>Traffic Control Plans Design Manual This manual provides an organized collection of traffic control standards, guidelines, policies, and procedures. It outlines Traffic Control Plans (TCP) Design in general (job description, design processes) and progresses to specific TCP design elements (Traffic Control Devices, standard drawings, bid estimates, specifications, etc.). It is to be used as a resource, a guide, a technical reference and a teaching aide as well.</p> | May 2009 | Traffic-Roadway |
| <p>Traffic Structures Design Manual This manual will guide regional technical center and consultant personnel in the design of traffic structures. Included are recommended guidelines the Traffic Structures Designer can use to design projects and provide construction support.</p> | May 2009 | Traffic-Roadway |
| <p>Bridge Design & Drafting Manual. This edition contains a new section on Accelerated Bridge Construction, as well as the latest corrections, clarifications, and up-to-date</p> | April 2009 | Bridge |

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| requirements for information used by the bridge design community to help guide the design of their bridge projects. | | |
| The Bridge Cost Data 2008 Book. The data includes layout sheets and project bid summaries for all bridge and structure projects from October 1, 2007 to September 30, 2008. For the electronic book on line, please go to: ftp://ftp.odot.state.or.us/Bridge/CostData/CostDataBook2008/cost_data_2008.pdf | May 2009 | Bridge |
| The Project Delivery Guide (PDG) has been updated and reformatted to make it easier to use. The Guide covers the basic steps associated with the program development portion of project delivery. Its main focus is on the steps involved in the development and delivery of various types of highway projects. The updated version is now available for your continued use: http://www.oregon.gov/ODOT/HWY/PDU/pd_guide.shtml | April 2009 | Project Delivery Unit |

New & Updated Operational Notices from the Project Delivery Leadership Team (PDLT)

| Title | Final Number | Last Updated | Issued by |
|---|--------------|--------------|-----------|
| No new or updated operational notices during this quarter. | | | |

Complete information regarding Project delivery operational notices, can be found at:

http://www.oregon.gov/ODOT/HWY/PDU/operational_notices.shtml

Contact for more information on PDLT Notices: Operational Notices maintained by Project Delivery Unit @ Kelly.A.BRUCE@odot.state.or.us

WHAT'S ON THE HORIZON?

Designing Under Financial Constraints: Tamira Clark, Region 1 Tech Center Manager, reported that a team from Region 1 has been researching “practical design” elements being incorporated by several DOT’s, including Kentucky, Missouri, North Dakota, Washington, and Idaho. This approach

allows flexibility to design to fiscal constraints and project type. Currently most states are utilizing practical design as a test model and employing it in parallel with their existing design practices.

Cathy Nelson acknowledged Region 1's research on and interest in practical design and said this is timely as this topic is gaining national recognition and the state legislature is also very interested in this topic. She said that ODOT has made a good start in implementing practical design concepts, without specifically using this terminology. Examples include the implementation of the new 1-R standards, design standards for STA's (Special Transportation Area's), and utilizing the design exception process.

FHWA has offered ODOT the opportunity for a peer review on practical design. Cathy is hoping to convene representatives from several states here in Oregon this summer, so that more ODOT staff have an opportunity to listen in during the day-long session to learn from other state's perspectives and experiences in this area. Cathy is pleased that the OTC Chair, Gail Achterman and the Chair for the Clackamas County Board of Commissioners, Lynn Peterson, are expected to be participants in the peer review exchange. This will be good information to help determine the next steps in Oregon.

Adapting Programmatic to STIP projects (HB 2001). Hal Gard, Geo-Environmental Manager, said that the new transportation bill, HB2001, passed the House and Senate and is awaiting the governor's signature. A key change for ODOT is outlined in Section 18, Sentence 2. This is a requirement for ODOT to adopt rules to incorporate environmental performance standards and improve the environmental permitting process for state construction projects. Geo-environmental will start gathering information from internal and external stakeholders, then work on individual agreements with federal regulatory agencies and possibly develop a "charter" to cover various approaches to help move forward with understanding what compliance looks like. Updates will be provided as this work moves forward.

Construction to Design Feedback Process: Jeff Gower, Construction Manager, presented this proposal. This formalizes ODOT processes to improve feedback to design engineers from Construction. The proposal was approved with a few minor adjustments. Once finalized, this information will be included as a chapter in the Project Delivery Guidebook, with an email communication.

As part of this process, the Tech Center Managers will present an annual report in March at the Technical Leadership Team, in order to share lessons learned. To develop the report, they will utilize information from the other

steps, which includes Construction Project Narrative Reports, Post Construction Reviews, Change Orders Database, and Contractor Project Evaluations for ODOT. The Quality Assurance Program Manager will also be invited to participate in this meeting. If there are issues identified that need to be worked, they will be added to the TLT Workplan for resolution.

Project Specific Special Provisions. Jeff Gower brought this proposal to the June TLT. It proposes a set of checks and balances to address special provisions issues, to improve communication, to outline decision making for special provisions, and to document approved unique changes for specific projects. Where possible, it advocates using existing boilerplate. However, if changes to current process are necessary, this is a proposed process to use, including an escalation clause if agreement on how to proceed can't be reached. Jeff will be gathering comments on the proposal and plans to bring this back for the August TLT meeting.

Buy America: Bridge Section worked with FHWA to prepare a Technical Advisory on the Federal Buy America provisions, which outlines changes in the program last year. The new procedures take much longer since each exception must be advertised in the Federal Register so industry can have a chance to comment on availability of steel products that are thought to be unavailable or in short supply in the U.S. The advisory outlines the ODOT process, as well as the revised Federal process and provide timelines to avoid delays with bid letting and construction. The ODOT Office of Prelet (OPL) will manage this program and be the first contact for handling questions of applications for exceptions. NOTE: Under this new process, ODOT was able to get a preapproved waiver of the Buy America provisions for the electrical components for the Siuslaw River Movable Bridge Rehab Project before it went to bid. The New Youngs Bay Project did not request the BA waiver in advance, so ODOT was forced to switch over to State funds for that project.

Freeway Median Barriers Guidance: Ed Fischer and Dan MacDonald, Traffic-Roadway Section, brought this item. TLT approved finalizing this guidance as written. Dan will work with regions to fill in gaps in median openings and look into whether this work qualifies for safety funds. He will also ensure that the guidance includes clear definitions of "Freeway" and "Interstate."

Right of Way Leadership Team: Dee Jones reported at the April TLT that she prepared a letter to the Region FHWA Administrator for 5 different requests to move the R/W process along more quickly for stimulus projects only. Requests are granted for State projects only, not trickled down to the Local Public Agencies. One approved request pertains to "permits of entries".

This exception will have a huge impact since timing will be greatly condensed. The R/WLT will be developing and publicizing instructions regarding any approved requests for stimulus projects. Once the federal stimulus dollars are retired, this approval from FHWA is retired.

Draft Interstate Signs Bulletin. Ed Fischer, Traffic-Roadway, said that a bulletin regarding Interstate Signs is being developed. This will likely be finalized during the next quarter.

KEY CHANGES (PEOPLE OR ORGANIZATION) OF INTEREST

Stacy Snider, Financial Manager for the OTIA Program, **Doug Peetz**, OPO Contract Coordinator and **Julie Ratcliff**, Internal Audits **will be transitioning to their new roles as Business Strategists, working collaboratively in Major Projects Branch and the ODOT Procurement Office.** Their new roles include identifying, developing, and taking advantage of methodologies and tools that will enable ODOT to leverage financial and supplier resources in a way to sustain current and future transportation systems. They will especially focus on the more complex and long duration projects from start up to close out.

ACKNOWLEDGEMENTS

Thanks to all from Cathy Nelson, Technical Services Manager, for their commitment and dedication on the ARRA stimulus package. Lots of extra efforts to meet the challenges of quickly getting these projects out to bid as quickly as possible, in order to get people to work.

Kudos to **Peggy Zahler, Technical Services**, for the comprehensive new training catalogue for ODOT technical staff involved in project delivery. This will be an invaluable tool. TLT members said it's "fantastic" to be able to actually receive and hold the finished product. Other comments ranged from "looks good," to "like the format," to "you have been incredibly patient and flexible" in putting it together.

Thanks to the **joint efforts by ACEC/ODOT/FHWA** on the collaborative efforts to develop and finalize the Profit/Fee Worksheet and the Consultant Evaluation Form. Working together helps to strengthen the partnership, to better understand each other's business perspectives, and to reach an understanding on tools to help meet the transportation needs for Oregon.

Thanks to **ACEC members, Bob Carson, Mason, Bruce, and Girard, Inc., and Tim Shell, KPFF**, and **ODOT members, Mary Cotter, Peggy Zahler, Lorrie Schaefer, and Ingrid Saltvold**, for their year-long work to

present the fourth annual 2009 ACEC/ODOT Conference. Again, this is truly a collaborative effort. Thanks for your dedicated work.

For Up-to-Date Information, see the Technical Services Website at <http://www.oregon.gov/ODOT/HWY/TECHSERV/> to find...

- ***Training:*** Information on current technical training open and available for consultants. ODOT employees can also research available classes on the ODOT Human Resources training intranet site.
- ***Guidance Documents (Directives, Bulletins, and Advisories):*** Please refer to this information for technical guidance currently in effect.
- ***Manuals:*** Technical manuals are included on this website.
- ***Leadership Team Charters and Membership information.***
- ***And more...***

Questions or Comments? Email Technical Services at technical.services@odot.state.or.us