

TECHNICAL LEADERSHIP TEAMS  
QUARTERLY REPORT  
April 2008 through June 2008

*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.*

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**KEY ACCOMPLISHMENTS**

**ACEC/ODOT 2008 Conference.** American Council of Engineering Companies of Oregon (ACEC) and the Oregon Department of Transportation third annual conference: Planning Oregon's Future Together was held on April 15, 2008 in Wilsonville. The conference attracted a large number of participants from all over the state and provided a valuable opportunity for ACEC Oregon members and ODOT employees both to interact on a personal level, as well as learn together. Attendees were overheard saying that this was the "best conference yet." Many thanks to those from ACEC and ODOT whose hard work and contributions helped make this year's conference successful.

Limited sets of complimentary DVD's of the morning session are available on a first come basis. Contact Peggy Zahler at

[Margaret.P.ZAHLER@odot.state.or.us](mailto:Margaret.P.ZAHLER@odot.state.or.us), if you would like a set.

In addition, conference presentations are available on line at

[http://www.oregon.gov/ODOT/CS/Training/Presentation\\_materials.shtml](http://www.oregon.gov/ODOT/CS/Training/Presentation_materials.shtml)

**Work Zone Tour Review process:** Ed Fischer reported that the Construction Leadership Team and the Traffic Leadership Team worked together and agreed that Scott McCanna, Traffic-Roadway, will continue to coordinate state-wide Design Work Zone Tours. The tours are focused on the design aspect of the project. The goals include allowing for hands-on experience for design staff with active projects and to further QA/QC efforts for Traffic Control Design. The plan will be to involve more Region staff, and include consultant staff who have been worked on the Traffic Control Plans, as appropriate, as part of these annual tours. Scott also develops an annual report for FHWA, based on these tours. Regions will continue to have separate Region Safety Tours which typically include Region and Salem Safety representatives, so have a different focus than the design tours.

**The 2008 Bridge Design conference** brought engineers together from all over the state to learn about the latest in bridge design, "best practices," the Columbia River Crossing project and more. Attendees also gained insight into unique challenges in a session on "lessons learned." Perhaps most importantly, they got to re-connect with one another.

The 2008 Conference, "What's new in bridge design?", featured presentations from Headquarters Bridge staff, Region Tech Center staff, bridge products industry representatives, and a bridge construction company. Attendees learned about recent updates to ODOT's Bridge Design and Practices Manual and ODOT's Standard Specs and Special Provisions. The "Lessons Learned" session focused on the concepts and research results associated with various steel and concrete bridge projects in Oregon. Another session discussed the potential impacts to the scope and schedule of a project when working over a railroad or an environmentally sensitive site.

There were several other topics and networking opportunities at the two-day event. To see what you missed, see the conference handouts at [www.oregon.gov/ODOT/HWY/BRIDGE/](http://www.oregon.gov/ODOT/HWY/BRIDGE/).

**Title sheets:** Cathy Nelson, Technical Services Manager, affirmed that, per OSBEELs, it is important to have her signature in the title block. It is a requirement for federal aid projects to have the approving official sign and date, along with Cathy Nelson's signature as the Chief Engineer. However, it is inappropriate for her signature to be accompanied with a stamp, as she is not directly involved in the project's engineering decisions. The goal of her signature is to acknowledge that there are processes and procedures in place for due diligence. The Traffic-Roadway Section Bulletin RD08-02(B), effective 6/1/2008 explains this change. (See the New Guidance list below.)

**OPO Update on the Small Contracting Program:** Diana Foster, ODOT Chief Procurement Officer, reported on the Small Contracting Program (SCP) to the TLT. The overall goal is to remove barriers and create opportunities for small business by contracting directly with them. The program's two parts — professional and technical services, and construction — provide small consultants and contractors a chance to contract as a "prime" with the agency and a chance to compete for financially meaningful projects without having to rely on a much larger company as the intermediary. For ODOT, the SCP gives managers a new, more flexible way to contract with small firms, resulting in more control over the timeliness, cost and quality of their projects.

Diana said the next phase is to incorporate the Construction Small Business Program. The criteria is a project size of \$100K or less. ODOT will register all who request, so the first step is to be registered. Criteria have been developed to focus the selection process. This will be a low bid process

unless it can be shown that this is not appropriate and must keep track and document. The design side utilizes a similar process but is open all the time.

For more information regarding the SCP program, call Lis Cooper at (503) 731-8510 or e-mail [elisabeth.cooper@odot.state.or.us](mailto:elisabeth.cooper@odot.state.or.us)

**Major Projects Update.** Ray Mabey, Bridge Delivery Unit at Major Projects reported that the recruitment for the Willamette River Bridge PM is coming out soon. OBEC has been selected as the A&E firm. The notice to proceed will be out soon. The CMGC notice to proceed should be out by July 1. The Willamette River Bridge is ODOT's 1<sup>st</sup> CMGC project.

He also said that OTIA is entering its heavy construction period. There are a number of good, stable, quality folks on board which is important since this and next year are the biggest construction seasons.

**Two new Scenic Byways** were designated at the April Oregon Transportation Commission meeting, according to Steve Lindland, Roadway Manager in the Traffic-Roadway Section.

- Umpqua River Scenic Byway
- Vineyard & Valley Scenic Tour Route.

**Two new Project Delivery Operational Notices (PD) were recently approved by the Project Delivery Leadership Team:**

- **PD-01A: Project Delivery Guidance Development** , was released 2/5/08 The purpose is to communicate and document the process for developing, implementing and managing new or revised project delivery guidance through PDLT.

- **PD-18: Planning / Project Development Integration** was released 1-31-08. The purpose is to establish the framework, roles and responsibilities, and the deliverable for communications between Planning and Project Delivery staff in the transition between Planning and Project Development. The purpose of this Notice is to establish expectations, outcomes, and roles and responsibilities.

These notices, as well as the other project delivery operational notices, can be found at:

[http://www.oregon.gov/ODOT/HWY/PDU/operational\\_notices.shtml](http://www.oregon.gov/ODOT/HWY/PDU/operational_notices.shtml)

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### New Guidance Documents from Technical Services

Title	Final Number	Effective Date	Issued by
<b>Hydraulics Design Deviation Requests</b>	TSB08-01(D)	Effective 04/15/2008	Technical Services
<p><b>Summary:</b> The purpose of this technical directive is to: define a hydraulics design deviation and outline the hydraulics design deviation process. Designers will occasionally want to use innovative designs or methods that may differ substantially from those discussed in the ODOT Hydraulics Manual. The hydraulic design deviation process is a way to introduce these details and methods which have worked well locally or from other states. This requirement is not intended to inhibit innovation or the ability of the designer to exercise good engineering judgment. On the contrary, it is intended to allow good innovative ideas be used and to potentially be included in future ODOT Hydraulics Manual updates.</p> <p><b>Contacts for more information:</b> Engineering and Asset Management Unit Manager @ <a href="mailto:Paul.R.Wirfs@ODOT.STATE.OR.US">Paul.R. Wirfs@ODOT.STATE.OR.US</a></p>			
<b>As Constructed Plans</b>	TSB08-01(B)	Effective 06/01/2008	Technical Services
<p><b>Summary:</b> As Constructed Plans reflect changes made to the Contract Plans during the construction of a highway project. They are important to archive and retain the improvements made to highway facilities as part of construction projects. The purpose of this Technical Bulletin is to establish a uniform and consistent process for preparing and distributing As Constructed Plans. Another purpose of this Technical Bulletin is to prepare and distribute As Constructed Plans to support Asset Management activities – update data</p>			

inventories to reflect changes made by project construction so that corporate data can be kept current and accurate.

**Contact for more information:** Roadway Engineering Manager @  
[steven.r.lindland@odot.state.or.us](mailto:steven.r.lindland@odot.state.or.us)

<b>Consultant Qualifications for Performing ODOT Biological Assessment</b>	GE08-01(B)	Effective 04/23/08  Validation Date 04/25/08	Geo- Environmental
<p><b>Summary:</b> This bulletin supersedes Bulletin GE2005-01 and establishes expectations for the consultant community proposing to contract with ODOT to provide Biological Assessments (BAs) under Section 7(a)(2) of the Endangered Species Act (ESA).</p> <p><b>Contact for more information:</b> ODOT Natural Resource Unit Manager @ <a href="mailto:Frances.Brindle@odot.state.or.us">Frances.Brindle@odot.state.or.us</a></p>			
<b>Median width and barrier warrant on the Interstate Freeway System</b>	RD08-01(B)	Effective 06/01/2008	Traffic- Roadway
<p><b>Summary:</b> Cross-over crashes in open medians in Interstate Freeways are occurring at an increased rate. While it has been common practice to install barrier in an open median in reaction to median cross-over head-on fatal crashes, it is now desirable to establish a standard for the installation of barriers in open medians. Adopting a standard for barriers in medians should reduce the number of Oregon's most severe crashes.</p> <p><b>Contact for more information:</b> Senior Roadside Design Engineer @ <a href="mailto:daniel.j.macdonald@odot.state.or.us">daniel.j.macdonald@odot.state.or.us</a> OR Senior Standards Engineer @ <a href="mailto:david.j.polly@odot.state.or.us">david.j.polly@odot.state.or.us</a></p>			
<b>Update Signature Block on Title Sheet</b>	RD08-02(B)	Effective 6/1/2008	Traffic- Roadway
<p><b>Summary:</b> This is to document the change to the signature block on the title sheet of construction projects. Note: This supersedes RD07-11(B).</p> <p><b>Contact for more information:</b> Senior Standards Engineer @ <a href="mailto:david.j.polly@odot.state.or.us">david.j.polly@odot.state.or.us</a>.</p>			
<b>Channelization &amp; Intersection Details</b>	RD08-03(B)	Effective 06/01/2008	Traffic- Roadway
<p><b>Summary:</b> Left turn channelization is used to reduce crashes and improve operations by separating left turning vehicles and through traffic. The standard has been reviewed and modified in order to reduce construction impacts and cost while still providing benefits to safety and operations.</p> <p><b>Contact for more information:</b> Senior Standards Engineer @ <a href="mailto:david.j.polly@odot.state.or.us">david.j.polly@odot.state.or.us</a> or <a href="mailto:christopher.s.henson@odot.state.or.us">christopher.s.henson@odot.state.or.us</a></p>			
<b>Coordination and Documentation Procedures by Environmental Staff for Emergency/Urgency</b>	GE08-02(A)	Effective 04/08/2008	Geo- Environmental

<b>Repairs</b>			
<p><b>Summary:</b> The purpose of this advisory is to provide guidance to region environmental staff on ESA and permit procedures for emergency/urgency repairs performed by Maintenance. It describes the coordination and documentation procedures required by the regulatory agencies, to be in effect until such time as ODOT has a written permit in place from the regulatory agencies.</p> <p><b>Contact for more information:</b> Biology Program Coordinator/Geo-Environmental Section @ <a href="mailto:Christine.c.maguire@odot.state.or.us">Christine.c.maguire@odot.state.or.us</a> OR Statewide Permits Coordinator/Geo-Environmental Section @ <a href="mailto:ken.franklin@odot.state.or.us">ken.franklin@odot.state.or.us</a> OR Office of Maintenance &amp; Operations @ <a href="mailto:susan.a.chase@odot.state.or.us">susan.a.chase@odot.state.or.us</a></p>			
<p><b>The following guidance documents have been rescinded since each of these is now incorporated into a manual or other document.</b></p>			
<b>Administrative Fee for Highway Approach Applications</b>	AM05-02(B)	Date Rescinded 04/24/2008	<b>Access Management</b>
<p><b>Where Covered:</b> ORS 374.310 amended to prohibit fees for approach road applications.</p>			
<b>Marked Crosswalks at Uncontrolled Locations</b>	TR06-02	Date Rescinded 5/1/2008	Traffic-Roadway
<p><b>Where covered:</b> This guidance can now be found in the Traffic Manual.</p>			
<b>TCP Design Manual Update Chapter 4</b>	TR07-04(B)	Date Rescinded 5/1/2008	Traffic-Roadway
<p><b>Where covered:</b> This guidance can now be found in the Traffic Control Plans Manual.</p>			
<b>Design Standards for Development of Temporary Freeway Crossover</b>	TR07-05(B)	Date Rescinded 5/1/2008	Traffic-Roadway
<p><b>Where covered:</b> This guidance can now be found in the Traffic Control Plans Manual.</p>			

Complete information regarding current and rescinded technical guidance is available @

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

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## WHAT'S ON THE HORIZON?

**Categorical Exclusions Minimums:** Hal Gard, Geo-Environmental Manager, reported that FHWA has reinterpreted NEPA, indicating that if using federal funds, it is necessary to have key environmental clearances before Right of Way can be acquired. Currently state funds are available and can be used for Right of Way acquisition. However, it is important to develop a long term strategy since there are risks inherent in current practice. The risks include the ability to recover costs if use state funds and the impacts if do early scoping for the Endangered Species Act (ESA). If project has such risks, consider NOT using federal funds. If the project is straightforward, consider using federal funds. Geo-Environmental has a meeting scheduled in May with FHWA to start the CE process discussion for longer term solutions.

**Billing Rate Group.** Diana Foster, reported to TLT on the progress of the Billing Rate Group. The ODOT Procurement Office is involved in establishing the rate but the Project Manager has a range to work within. One purpose of this business strategy is to bring higher end rates to the attention of contractors, alerting them to potential impacts on their ability to maintain competitive edge.

**Bridge Project Delivery Review Process Under Development.** Bruce Johnson, Bridge Engineer, said that the Bridge Leadership Team is working on a process for the oversight of Bridge designs by Salem at key milestones. The focus of this process is for region delivered projects, with an emphasis

on different or complex features, such as using a new technology. This is meant to provide an opportunity for mentoring and sharing best practices and ensuring consistent best design practices. This review process will only be applicable to Bridge projects.

Mark Hansen presented information at TLT regarding the **joint meeting of the Environmental and Right of Way Leadership Teams**. They met to look at opportunities to optimize the scheduling process for Environmental and Right of Way. Both teams have collaborated to put the final touches on the draft which is based on MS Project schedule. Each team is exploring several areas to see what can be done. Options the teams are considering include funding Right of Way acquisitions with state funds as a short term measure, defining needed information for permit in order to get started earlier, developing programmatic, reviewing projects thoroughly early in the process in order to identify difficult projects where it is necessary to put time and attention, and looking at the archeology process to see if there are opportunities to streamline the process. Both teams felt the joint meeting was very beneficial and helped to better understand each others challenges, as well as look at opportunities for improvements.

**Vertical Clearance:** Ed Fischer, Traffic-Roadway Manager, reported that a team is being convened to develop a comprehensive technical bulletin reflecting vertical clearance changes to the Highway Design Manual. Until the guidance is developed, all work that is preservation or maintenance, if not at the newly established thresholds, should be maintained at the status quo.

**MSPOT Update.** Dave Lutz, Project Delivery Unit Manager, provided a report on the statewide MSPOT project team. The overall goals are to institutionalize the use of MS Project as the statewide reporting mechanism

for the status of transportation projects and to help identify resourcing needs for projects. MSPOT has developed a newsletter for ODOT staff in order to regularly communicate news about the progress by the MSPOT project team. There are three sub-teams, all with statewide representation, working on:

- *Systems* (policy processes, how to use system). A working paper is being developed to report on how the system is being used by various groups (i.e., Area Managers, Project Managers, Project Leaders, Tech Centers, Tech Services). Currently, this group is laying out roles and responsibilities.
- *Training*: Developing a survey to assess gaps in knowledge around uses of the system
- *Templates*: Looking at minimum milestones for all templates to ensure consistency statewide. This group, which includes Steve Cooley and Mark Thompson, Tech Center Managers, is using a Mod 2 project with all applicable features in order to develop a model of what's needed.

**Asset Update.** Laura Wipper and Steve Lindland reported that they are working with the Roadway Leadership Team to improve the coordination of transportation infrastructure information over the life of the asset. This project involves an iterative process to improve data collection and information sharing over time. Currently, the team is compiling information about asset owners, who they are and which groups could best utilize asset information. The team will be looking at a pilot project to determine if there are cost effective refinements to existing processes to better utilize and coordinate asset information. TLT said to keep going and asked the team to provide updates when major milestones are achieved, and to further discuss the anticipated level of effort and the cost/benefit of the alternatives.

**Machine Control:** Ron Singh presented information to TLT on new and emerging technologies. He reported that machine control is a tiny piece of a larger concept called “construction automation.” ODOT did its first machine control project in 2001. Then, the technology was not used for a while. But, today, the use of this technology is growing. Currently machine control is being used in grading – and it is branching out. It is important, as ODOT incorporates this technology, to develop procedures, inspection protocols, etc. so that ODOT is ready to utilize this technology fully and well. Ron is putting together a team to develop standards and processes to facilitate success using machine control technology.

This team will also discuss questions related to this technology, such as:

- How much do ODOT want to get involved with this technology?
- What guidance is needed? Overall? At the operator level?
- What types of projects will this be used for?
- What kinds of training are needed for success in utilizing machine control technology?

**GPS resource grade status report.** Ron Singh reported that there are 3 grades of GPS equipment: recreational, resource, and survey. ODOT is currently using resource grade GPS for asset management, wetland delineation, and maintenance. A cooperative strategy has been developed between Geometronics and Transportation Development to purchase and train staff to use GPS equipment. The processes are in place at ODOT for usage. Hal Gard indicated that Geo/Environmental has some GPS tools and will make them available if needed.

**Digital Signatures:** Ron reported that OSBEELS is considering whether ODOT can go ahead with digital signatures. ODOT is ready to get started if given the authorization. A committee has been convened to look at how to

implement for contract plans. ODOT's implementation will take some time to allow for a thorough discussion, to make sure issues are addressed and good processes are in place

**Clarifying DAP across ODOT:** Kim Hunn-Basl, Project Delivery Unit, reported that she is working with the Project Delivery Leadership Team as the lead for this project. The question is: What does quality DAP submittal look like? Included in this is: How do you identify that you are at the end of DAP? Key milestones to be met and what must be in place to move forward with minimal risk. She is in the process of researching the various region processes and looking for similarities and differences. She is also looking for the core principles and clarifying the original intent. She will also be attending a future ACEC/ODOT Steering Committee meeting to gather input.

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#### **KEY CHANGES (PEOPLE OR ORGANIZATION) OF INTEREST**

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**Jane Lee** is the new Region 2 Manager. She has a broad range of transportation experience in ODOT. She recently was an Area Manager in Region 2. Congratulations, Jane.

**Tim Dodson**, Bridge Delivery Unit, is managing the Willamette River Bridge Project on an interim basis. He can be reached at 503-986-3311.

**Paul DePalma** is now the manager of the Program Management and Oversight Services (PMOS) Unit in the Major Projects Branch. His phone number is 503-[731-8417](tel:503-731-8417)

**Jim Cox**, 503-986-6612, is the manager of the Advanced Contracting Unit (ACU) at Major Projects.

**Sandra Rosier**, 503-986-6625 is the Manager of the Office Administration Unit at the Major Projects Branch.

**Lisa Ansell** is working on the statewide Quality Assurance program and is on rotational assignment for two years to help assess the Quality Assurance Program and determine the next steps to move this forward. She is part of the Office of Project Letting in the Traffic-Roadway Section. She has held a

variety of positions in ODOT and most recently was a Project Leader in Region 2. She will be meeting with a variety of external and internal stakeholders to learn more about what's working and suggestions for improvements. She can be reached at 503-986-3751.

**Lissa Willis**, 503-986-3985, a Public Affairs Specialist for the OTIA III Bridge Program, has accepted a job rotation opportunity with the Project Delivery Unit. Her primary focus will be revising the Project Delivery Guidebook and developing the next generation "Project Delivery Academy". She will also be involved in various other training program activities.

**Jyll Smith**, will be filling Lissa Willis's role while she is on rotation. She comes to major Projects from Region 2 where she worked as the Community Affairs Specialist.

**Zach Hunter**, Right of Way, 503-986-3657, is the interim State Utilities Liaison, in addition to his duties as the State Railroad Liaison. This will be on an interim basis, while a statewide task force is working on evaluating the Statewide Utilities Relocation Program. Matt Caswell accepted a position as the Access Management Engineer for Region 2. Thanks, Zach, for taking on additional responsibilities and the best to Matt in his new role.

**Matthew Badzinski**, 503-986-6375, has accepted the Project Systems Development Manager position with the Project Delivery Unit. He comes to ODOT from the Adidas Group in Portland where he was involved in a variety of cross-functional business process improvement initiatives. Matt will be the primary program-level systems manager for Enterprise Content Management as it is developed and implemented in the Project Delivery business-line.

**Greg Stellmach** will serve as the Interim Office of Project Letting Manager through the end of October. Eryca McCartin is expected to return November 1st. Greg comes to this position with a depth of technical knowledge and experience both within ODOT and outside. He came to ODOT in 2001 as a Work Zone Designer, Traffic Devices Engineer, and since April 2005 has served as the State Sign Engineer. He graduated from the University of Minnesota and is a licensed Civil Engineer.

**Brenda Marcus** is a new Construction Claims Specialist in the Construction Section. Brenda has been with ODOT for over 24 years, with extensive construction and project delivery background. Most recently Brenda developed and successfully managed the procurement for the CMGC contract on the I-5 Willamette River Bridge in Eugene.

**Katie Johnson** will serve at the Interim State Sign Engineer, while Greg is the Interim Office of Project Letting Manager. Katie has held various positions at ODOT since starting her career as an Engineering Intern in 1997 and participating in The Graduate Engineering Program starting in 1999. She has held several traffic positions in Region 2 and is the Traffic Devices Engineer in the Traffic- Roadway Section. Katie is a graduate of Oregon State University and is a licensed Civil Engineer.

**Shane Terwilliger** will be working part time in the Office of Project Letting filling in behind Karen Scott in Pre-Letting. Karen is expected to return mid-September. To determine who to work with in OPL for your project going through PS&E, please continue to refer to the Bid Planning Schedule on the OPL website or contact Colleen Hunter. Shane comes to TS from Region 2 where he is a Region Spec Writer, and also does construction schedules, cost estimating and local program review. Shane started with ODOT in 1989 and has worked in a variety of units. Shane is a licensed Land Surveyor.

**Michelle Gauthier** is the new executive assistant for Cathy Nelson, Technical Services Manager/Chief Engineer. She brings with her experience working in local government, as well managing a small business. Her phone number is 503-986-3305.

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## RECOGNITION

**Kudos to Karen Tatman, Quincy Engineering, for the concept for the Design Criteria Checklist and to Jeff Olson, Quincy Engineering,** who participated on the project team with ACEC and ODOT members to develop this for use within ODOT. This tool will clarify the design criteria for a project early in the process.

**Thanks to ACEC and ODOT staff** that helped make this year's 2008 ACEC/ODOT Conference very successful. Thanks, too, to everyone who filled out surveys regarding topics of interest. This really helped the conference committee focus the agenda.

***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 @ [technical.services@odot.state.or.us](mailto:technical.services@odot.state.or.us)**