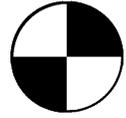




# Highway Division Project Delivery Leadership Team Operational Notice



NUMBER	REVISION #	SUPERSEDES	EFFECTIVE DATE	LAST REVIEW	RESCINDED DATE
PD-16	2	3/1/2013	6/3/2014	5/2014	N/A
SUBJECT			ISSUING BODY		
Highway Mobility			Project Delivery Leadership Team (PDLT)		

## PURPOSE

The document provides guidance on implementing key ODOT mobility policies, processes, roles and responsibilities related to project delivery. This guidance applies to all state and federally funded projects on state highways, at the project development stage through construction. This operational notice is consistent with the policies and procedures contained within the more detailed ODOT’s [Mobility Procedures Manual \(MPM\)](#)

## RATIONALE

Because of the economic importance of free-flowing, predictable highway travel, ODOT has established requirements and processes for managing communication and issues impacting freight and traffic mobility. Mobility is defined as the ease with which people and goods move throughout their community, state, and world. Mobility is valuable because it provides access to jobs, services, and markets. Without question, Transportation’s most essential function is to provide mobility for people and goods.

ODOT is required to comply with the FHWA 630 Rule for Work Zone Safety and Mobility, and has agreements with the trucking industry regarding mobility issues. In addition, one of ODOT’s Context Sensitive and Sustainable Solutions (CS<sup>3</sup>) goals is to “maintain or improve traffic mobility and safety; keep traffic moving.” Implementation will ensure that ODOT upholds its agreements with the trucking industry, complies with mobility provisions of FHWA rules, and meets its goals for traffic mobility and safety.

## KEY ROLES & RESPONSIBILITIES:

ODOT’s mobility program is managed by the Motor Carrier Transportation Division in partnership with the Regions. Roles and responsibilities for ODOT’s mobility program are included in the [MPM](#). (See the [Mobility Matrix](#) at the end of this document for activities and tools specific to project delivery).

## KEY POLICY CONSIDERATIONS:

The [MPM](#) is the accepted authority for mobility policy for the Agency. Refer to the [MPM](#) for details on processes and policy.

Key policy considerations regarding mobility management include:

1. Identification of mobility issues  
Mobility issues, including traffic, freight, and emergency services, must be considered at the very beginning of the project development process. Possible impacts to each of these must be identified and considered when a project is programmed. The Mobility Considerations Project Checklist should be used to identify mobility issues both in project development and during project construction (e.g. deviating from language in the specifications).
2. Communication and Coordination  
Appropriate and timely communication within ODOT and with industry stakeholders affects the success of traffic mobility on Oregon’s transportation system. Actions that may affect mobility

require specific notification and communication processes. These processes include collaboration with key industry stakeholders in initial and continuing conversations about alternatives and mitigation requirements.

Project Leaders, Local Agency Liaisons, and Project Managers (during the Design Acceptance through Advanced Plans milestones) and Local Agency Liaisons/Project Managers (during construction) have responsibility for engaging MCTD and the trucking industry in discussions regarding potential restrictions. They are also responsible for documenting and sharing MCTD and trucking industry support of potential restrictions. See Page 3 of the *Project Mobility Considerations Check List* for more detail on these responsibilities and timeframes.

3. Temporary Restrictions

Several factors must be considered before imposing temporary restrictions on vertical or horizontal clearance, weight, route, detours, ramp closures, or before imposing any traffic delays.

Corridor thresholds have been established to quantify the maximum delay or travel time created by highway work zone activities that would be considered tolerable by the traveling public and provide Regions with information to assist in managing mobility. While thresholds are in effect 24 hours per day, 365 days per year, it is understood that it may be difficult to meet the thresholds during high traffic volumes related to seasonal traffic, holidays, and special events. Current delay or travel time threshold information can be found in the Corridor Transportation Management Plans located on the Statewide Traffic Mobility Website.

4. Permanent Restrictions

Permanent changes (e.g., vertical clearance, horizontal clearance, length restrictions, and weight restrictions) to the roadway system that will impact freight mobility need to be considered in the planning and project development process and must be discussed with MCTD and the trucking industry.

Projects that have the potential to permanently reduce freight carrying-capacity require consultation with the trucking industry facilitated by MCTD. Guidelines for this consultation can be found online at: <http://www.oregon.gov/ODOT/TD/TP/pages/ors366.215.aspx>

Roundabout-specific communication with the trucking industry is necessary on a case-by-case basis on decision elements such as route mobility, design vehicle exceptions, over-dimension vehicles to be accommodated, and typical design elements for any proposed roundabout on the state highway system. Guidelines for this communication can be found online at: [http://www.oregon.gov/ODOT/HWY/TECHSERV/docs/pdf/des\\_02.pdf](http://www.oregon.gov/ODOT/HWY/TECHSERV/docs/pdf/des_02.pdf)

5. Transportation Management Plan (TMP)

The Project-Level TMP addresses traffic management for each project or group of projects that are inter-related in a corridor and includes decisions made regarding, but not limited to, traffic control plan design, construction staging, traffic/freight mitigation and public information. TMP's include documentation of design decisions made to mitigate mobility issues (e.g. freight restrictions and delays) identified by the Project Team. The TMP is to be started early in the project development process, but is considered a living document that will continually grow and change throughout project development.

A TMP is required for **all projects receiving Federal Aid dollars**. TMP components include:

- a. Traffic Control Plan (TCP) — always included
- b. Traffic Operations (TO) Strategies — included for “Significant Projects” — *see below*
- c. Public Information (PI) Campaigns — included for “Significant Projects” — *see below*

Criteria used to determine which TMP components are to be included in the TMP:

- a. Significant Projects include freeway projects within a Transportation Management Area (TMA), or any project with a budget greater than \$5 million.
- b. All other projects will include the Traffic Control Plan (TCP) as a minimum. Inclusion of TO and PI components are recommended, but not required.

The Project-Level TMP Guidance Document along with example TMPs are available as a link at the Statewide Traffic Mobility Internet under “Documents & Forms”.

6. Contract & Design Considerations

During the development of projects, consideration should be given to practices that will eliminate or minimize mobility issues for both traffic and freight. Practices in both the design phase and during construction should be considered. Examples of these practices may include:

- a. Accelerated or innovative contracting methods, such as:
  - i. Incentives/disincentives to encourage early contract completion (see Operational Notice PD 17 – Incentive/Disincentive Contracting Provisions)
  - ii. A+B contracting, taking advantage of the “time” component
  - iii. A+C contracting, requiring Contractor Pre-qualifications for complex or specialty work
  - iv. Design-Build contracting
- b. Minimizing contract duration
- c. Alternative design materials and methods
- d. Alternative innovative construction materials and methods (e.g. PPC & high-early strength concretes)
- e. Alternative construction staging design materials and methods to accelerate construction and reduce overall delay:
  - i. On-site diversions to minimize stages
  - ii. Full roadway closures with off-system detours
  - iii. Partial detours
  - iv. Plan for unbalanced directional volumes
- f. Plan for future maintenance / rehabilitation preservation needs
- g. Focus on performance-based specifications (design-build) performance standards
- h. ITS methods for monitoring/managing real-time traffic operations

**EXPECTATIONS:**

Regions are expected to evaluate all construction projects for mobility and review options carefully throughout each phase of the project to minimize the duration and severity of freight restrictions and traffic delays. Project teams will collaborate with key industry stakeholders through the Motor Carrier Transportation Division in initial and continuing conversations about alternatives and mitigation requirements. Delay estimates will be prepared for each construction and maintenance project, and compared to the corridor delay thresholds. When discrepancies occur Regions must make decisions that eliminate or minimize traffic delays, such as:

- Adjusting schedules, staging and/or traffic management strategies
- Engaging alternative design practices, construction materials, construction methods and contracting methods
- Request an exception (any delay is an exception) — See Chapter 4 of the MPM for exception criteria and process. Exceptions should be planned during the design phase of a project to allow ODOT personnel ample time to prepare for delays on these routes. Exceptions are sought through the Region Mobility staff. Exceptions requests are reviewed by the MCTD Administrator

and final approval is made by the Region Manager. Typically, exception requests are addressed before construction; however,

- Critical activity information may not be available until the project is underway and would need to be submitted during construction activities. Examples include rolling slow-downs for beam swings or long detours for bridge demolition.
- It is understood that conditions in the field may change that would result in longer than expected delays. An exception may be sought during construction if other mitigation methods are not practical.

**REFERENCES:**

- [Project Mobility Considerations Checklist](#)
- [Statewide Traffic Mobility Website](#)
- [Mobility Procedure Manual \(MPM\)](#)
- [Highway Restriction Notice](#) (Form 734-2357)
- [Motor Carrier Transportation Advisory Committee](#)
- [Corridor Transportation Management Plans](#)
- [Project-Level Transportation Management Plan Guidance](#)
- [Highway Design Manual](#)
- [Technical Bulletins](#)
- [PDLT Operational Notice 17](#)  
(Incentive/Disincentive Contracting Provisions)

## Mobility Matrix – Key Roles, Actions and Timeframes

Refer to the [Statewide Traffic Mobility Website](#) and [Mobility Procedures Manual](#) for specific tools and details.

Role	Action	When Occurs
MCTD Freight Mobility Coordinator (FMC)	<ul style="list-style-type: none"> <li>▪ Initiate all trucking industry contacts</li> <li>▪ Set up meetings with trucking industry representatives as needed</li> <li>▪ Identify freight issues, develop options and solutions</li> <li>▪ Track and provide highway information to trucking industry stakeholders</li> <li>▪ Provide industry project team members for high impact projects</li> <li>▪ Notify trucking industry of planned restrictions</li> <li>▪ Provide vehicle size, weight, and permit information to project teams</li> <li>▪ Provide information regarding existing restrictions on potential detour routes to project teams</li> <li>▪ Provide documentation of MCTD and trucking industry support for planned restrictions and proposed construction to Project Leaders and Project Managers</li> </ul>	<p>ASAP; 21 days prior to planned restrictions; throughout project development.</p> <p>ASAP when pursuing unplanned necessary restriction revisions on active construction projects.</p>
Project Leader, Local Agency Liaison, Project Manager, and Project Team	<ul style="list-style-type: none"> <li>▪ Identify and consider mobility issues and impacts throughout project scoping and development</li> <li>▪ Develop project specific Transportation Management Plan (TMP)</li> <li>▪ Involve MCTD FMC early in process when mobility issues are identified, including potential detour routes, prior to Design Acceptance milestone.</li> <li>▪ Send MCTD FMC copy of stakeholder participation plan or “project information paper” for use in notifying the trucking industry of public meetings and project plans</li> <li>▪ Provide documentation of MCTD and trucking industry support for planned restrictions and proposed construction to Region Mobility Liaison</li> <li>▪ Identify risks associated with mobility and plan/evaluate risk responses</li> <li>▪ Develop Traffic Control Plan (TCP)</li> <li>▪ Notify MCTD FMC of planned restrictions or detours</li> <li>▪ Notify State Bridge Engineer regarding planned bridge load posting</li> <li>▪ Ensure consideration given to alternative design practices, materials, and construction methods to minimize delays and restrictions</li> <li>▪ Ensure consideration given to various contracting methods to minimize delays and restrictions (i.e. A+B, or Incentive/Disincentive provisions)</li> <li>▪ Ensure other factors given consideration (secondary routes, congestion impacts, risk analysis, emergency mobility plans, permitting requirements)</li> <li>▪ Complete <b><i>Project Mobility Considerations Checklist</i></b> and <b>submit</b> to Office of Project Letting as part of PS&amp;E Package for ODOT bid projects. For LPA certified projects, complete <b><i>Project Mobility Considerations Checklist</i></b> and include as part of PS&amp;E Package at the region office with a copy to the Region Mobility Liaison.</li> </ul>	<p>ASAP; by DAP (revise through Advanced Plans if changes to agreements)</p>

**Mobility Matrix – Key Roles, Actions and Tools (Cont.)**

Role	Action	When Occurs
Area Managers	<ul style="list-style-type: none"> <li>• Works with the Region Mobility Liaison and project development and construction staff to ensure that projects and activities meet the mobility requirements.</li> <li>• Serves on the Region Mobility Committee.</li> <li>• Specifically ensures that staff:                             <ul style="list-style-type: none"> <li>○ Engage the Mobility Liaison early when mobility issues are identified;</li> <li>○ Copy the Mobility Liaison on any project items for use in notifying the trucking industry of public meetings and project plans;</li> <li>○ Identify and evaluate risks associated with mobility;</li> <li>○ Notify the Mobility Liaison of planned restrictions, delays, or detours;</li> <li>○ Evaluate alternative design practices, materials, and construction methods to minimize delays and restrictions; and</li> <li>○ Work with the Mobility Liaison, Region staff, MCTD, local governments, industry stakeholders, and others to resolve conflicts.</li> </ul> </li> </ul>	ASAP; 28 days prior to planned restrictions;
Project Managers, Consultant Project Managers, Local Agency Liaisons	<ul style="list-style-type: none"> <li>▪ Implement TMP and TCP</li> <li>▪ Notify MCTD FMC when work zones restrict width, length, height or weight of trucks</li> <li>▪ Notify MCTDC FMC of planned detours</li> <li>▪ Notify MCTD FMC when restriction is lifted</li> <li>▪ Notify MCTD FMC of any changes to traffic control plan</li> <li>▪ Review and approve adequacy of information contained in Form #734-2357 Highway Restriction Notice as prepared by contractor and then forwarding the approved form to MCTD Freight Mobility Coordinator 14 to 28 days prior to any planned work zone restriction during construction</li> <li>▪ Before proposing any changes during construction that have the potential to adversely affect mobility (i.e. additional restrictions, changes in start dates, etc.) or differ from specified restrictions / previous agreements made during the project development process, Project Managers must (1) start by engaging the contractor, Region Mobility coordinator and any relevant region resources to discuss proposed changes to determine if the change is warranted and supported by the Region and then (2) engage MCTD to discuss potential changes and receive approval <b>before</b> any agreements are made with the contractor</li> <li>▪ Provide documentation of MCTD and trucking industry support for changes in restrictions and construction to Region Mobility Liaison</li> </ul>	28 days prior to planned restrictions. ASAP when pursuing unplanned necessary restriction revisions.
State Bridge Engineer	<ul style="list-style-type: none"> <li>▪ Notify District Manager, MCTD Administrator, Communications Division, and Office of the Director regarding need for bridge load posting</li> </ul>	Allow plenty of time to prepare and implement detours w/o compromising the integrity of the bridge

**Mobility Matrix – Key Roles, Actions and Tools (Cont.)**

<b>Role</b>	<b>Action</b>	<b>When Occurs</b>
District Manager	<ul style="list-style-type: none"> <li>▪ Notify the Region Mobility Liaison and the MCTD Freight Mobility Coordinator when work zones restrict width, length, height, or weight of truck;</li> <li>▪ Notify the Region Mobility Liaison and the MCTD Freight Mobility Coordinator of planned detours;</li> <li>▪ Notify the Region Mobility Liaison and the MCTD Freight Mobility Coordinator when restrictions are changed or lifted;</li> <li>▪ Submit Form #734-2357 Highway Restriction Notice 14 or 28 days prior to any planned work zone restriction when maintenance mobility activities 2 or 3 apply</li> </ul>	28 days prior to planned restrictions;
Region Mobility Liaison	<ul style="list-style-type: none"> <li>▪ Collect mobility information for all projects occurring in the Region and in neighboring/bordering jurisdictions</li> <li>▪ Identify and develop resolution strategies for schedule and delay threshold conflicts that affect corridor mobility</li> <li>▪ Collect data on existing or proposed detour routes</li> <li>▪ Work with project team leaders/managers to develop delay exception requests and seek input from MCTD Wednesday Freight Meetings</li> <li>▪ Work with industry stakeholders, the ODOT Mobility Policy Committee, region staff, MCTD, local governments, and others to resolve conflicts</li> <li>▪ Track all special community events, major agriculture activities, and any other information that would impact traffic volumes or delays</li> <li>▪ Ensure interregional mobility via participation in corridor mobility committees</li> <li>▪ Collaborate with ODOT Rail Division about the viability of proposed detour routes and rail project operations that may affect mobility</li> <li>▪ Coordinate mobility with adjoining Regions on their activities</li> <li>▪ Work with the Region Planning Unit to vet potential reduction in capacity issues with design proposals received from local stakeholders</li> <li>▪ Review designs for local programs including development reviews</li> </ul>	Throughout project lifecycle
Motor Carrier Division Administrator or Mobility Policy Committee	<ul style="list-style-type: none"> <li>▪ Forecast, prioritize and coordinate projects at a statewide level according to set mobility standards</li> <li>▪ Ensure statewide mobility via coordination of mobility steering committee, corridor mobility committees, and region mobility committees</li> <li>▪ Make decisions regarding conflicts unable to be resolved at region level</li> <li>▪ Provide policies, standards, and guidelines regarding mobility, in partnership with Region Staff, Project Delivery Staff and MCTD</li> </ul>	