

Appendix B: Description of Project Access Management Subtasks

Access Management deliverables are typically completed during three macro-level Critical Path Milestones in a STIP project and in the immediate aftermath of construction. These milestones are the *Draft STIP*, *Design Acceptance*, *Final Plans/PS&E* and after construction between 2nd and 3rd Note. Following is a brief description of access management deliverables typically completed at each of these milestones. These deliverables are required to ensure that an accurate record is maintained of the status of existing highway approaches and are required except when the Region Manager signs an Exemption Memorandum.

Draft STIP Milestone

Completion of the deliverables listed for this milestone are intended to ensure that the scope, schedule, and budget of projects programmed in the STIP provide for access management work tasks consistent with rules, policies, and the requirements and guidelines of this Notice.

- Access Control Report – The Access Control Report documents and summarizes the research on the location of access control performed by the Right of Way Section of the Technical Services Branch. Information in the report is used to develop the Scoping Report and the Existing Approaches Status Report.
- Existing Approaches Status Report -- Documentation that confirms the location of all existing approaches under the provisions of OAR 734-051 prior to any project work. It is a baseline report of all of the existing approaches on the highway at the beginning of the project, which is necessary as a first step in getting to the Official Project Access List, which lists all of the approaches to be provided within the project limits upon completion of the project. This report may be a stand-alone report or combined with other reports or documentation.
- Right of way cost estimate – Cost estimate for purchasing access rights, offers to remedy closure of approaches (see OAR 734-051-6010 through 6070), and other property acquisitions as needed.
- Access management scoping report -- Report identifies and describes all access management issues that have potential scope, schedule and budget consequences for the project. This includes requirements and recommendations for development of an AMStrat or Facility Plan; the potential scope of access closures or modifications that could impact right of way acquisition; access issues, problems, and recommendations for further consideration during project development. The report could be a stand-alone document, or a component of a comprehensive project scoping report.
- Preliminary Engineering (PE) cost estimate – Cost estimate for personnel, services and supplies that will be charged to the project expenditure account (EA). The cost estimate is expected to document assumptions and rationale underlying the estimate and to address all the major work requirements and recommendations in the scoping report. Developing the cost estimate may require compiling information from several sources involved in the project, including maintenance, planning, consultants, right of way, and other ODOT staff and consultants.

- Public/stakeholder involvement plan – A plan that explains how communication regarding access management issues on the project will be managed. The plan may be a stand-alone document or a component of the Project Communications Plan specified in PD-12.
- MS Project schedule of work – Schedule of access management tasks and deliverables entered in MS Project based on what is known about needs and requirements of the project at the Draft STIP milestone.

Design Acceptance Milestone

Completion of the deliverables listed for this milestone are intended to ensure that critical decisions are made in a timely manner and incorporated into subsequent project design, right of way acquisition, communication plans, budget and schedule.

- Methodology -- A document that describes the criteria, including goals and objectives, which will be used to evaluate approaches for possible modification, relocation or closure. It also includes how to evaluate and balance the economic development objectives of properties abutting state highways, with the transportation safety and access management objectives of the state highway.
- Methodology Review – Affected property owners may request a review of the Methodology in a Collaborative Discussion and/or Dispute Review Board.
- AMStrat -- An AMStrat is required for any STIP project that involves modification, relocation or removal of legal approaches. The document describes which approaches will be modified, relocated or removed.
- Official Project Access List. The Official Project Access List documents approval of all approaches to be provided within the project limits upon completion of the project. Documented approval of this list by the RAME and the Technical Center Manager is required.
- Access Deficiency List¹. This list is a subset of the Official Project Access List. It lists all accesses that will remain open upon completion of the project but are considered priorities for future modification, relocation or removal. This list is prioritized by the Region and submitted to the Statewide Access Management Program Office. The Statewide Office will develop criteria for the Region to use in prioritizing this list. At completion of this milestone, the deficiency list should be compiled and maintained at the District office, with a copy going to the Statewide Access Management Program Office.
- Access management element of Design Acceptance Memorandum – Narrative that describes the principal design features to address access management that will be

¹ The purpose of the Access Deficiency List is to develop a statewide inventory that helps to assess funding needs and priorities for improvements. It is recommended that the list also be sent to the District Office where these accesses can be flagged for action if future change of use or other actions allow.

incorporated into the project, i.e. medians, driveway consolidation, revising local street connections, access control, turning movement restrictions, etc.

- Access modification and closure letters delivered to property owners². Letters notifying property owners of changes that will be made to their access as part of the project and their appeal rights under OAR 734-051. Copies of all closure letters are to be reviewed by the Statewide Access Management Program Office prior to mailing to the landowner.
- IGA provisions to address local government access issues (if applicable). These provisions address work that the local government needs to authorize to occur as part of the project because it affects facilities or land under local jurisdiction. For example, closing or changing the alignment of local streets, or moving an access from the state highway to a local road. *It is important to identify the need for such actions as early as possible and to work with local governments to develop IGA provisions.* Depending on the nature of the local actions and the local code, amendments to the local Transportation System Plan (TSP) or Comprehensive Plan may be required. These amendments can involve lengthy public hearing processes which could impact the project schedule and budget. A TSP amendment is a land use decision and must occur before the final environmental document is issued for a Class 1 or Class 3 project or before construction of a Class 2 project.
- Updated schedule and budget to complete access management work. Updates incorporated into the overall schedule for completing project work.

Final Contract Plans/PS&E Milestone

Completion of the deliverables listed for this milestone will ensure that required administrative actions are completed, and that deliverables and requirements have been met.

- Local TSP or Comprehensive Plan amendments (if applicable). Completion of local government actions needed to authorize project work affecting facilities or land under local jurisdiction. This requirement applies only to Class 2 environmental projects at this milestone. (For Class 1 and Class 3 projects, these actions must occur before the final environmental document is issued.)
- Oregon Transportation Commission decision/approval action (if applicable). Project file documentation of approval action by OTC may consist of a memo-to-file, OTC minutes (or excerpt), or other documentation of official action.
- Access Management Checklist. Checklist completed by the Technical Services Branch, Office of Pre-Letting. Projects will not be released for bid advertising until all requirements listed are documented or can be otherwise verified. Exceptions to this requirement may be granted by the Roadway Section Manager in accordance with the Office of Pre-Letting procedures. z

² Some decisions regarding access may not be known at this milestone. The Project Communication Plan should establish expectations and provide guidance for communicating with property owners who may be affected by decisions at a future point in the project.

Following Construction – Between 2nd Note and 3rd Note

Completion of the deliverables listed for this milestone are intended to ensure that after construction and when the final documentation tasks are being completed on a project, that permit records are updated by the District Offices. Completion of this task at this time in the project schedule ensures that access management tasks identified in the OPAL are completed prior to project closeout.

- Confirmation of CHAMPS records. This deliverable confirms that information in the Central Highway Approach/Maintenance System (CHAMPS) has been reviewed and revised to accurately reflect the existing approaches after the project's completion. This may result in issuing new permits or revising existing permit records. The confirmation required by this deliverable may be noted on the Official Project Access List or by separate memo to the project file. A copy of the confirmation must be submitted to the Statewide Access Management Program Office.