

5-21-04

Prime - Kittleson
Sub - CH2M Hill

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WORK ORDER CONTRACT
Land Use/Transportation Planning

Work Order Contract #

Agreement to Agree #

Project Name and Location: **I-5 Columbia River Crossing Partnership; Conceptual Engineering and Environmental Analysis**

This Work Order Contract ("WOC") hereby incorporates by this reference all of the terms and conditions contained in the Agreement to Agree ("ATA") between the Oregon Department of Transportation ("Agency") and [redacted] ("Contractor"), effective date [redacted], 200[redacted], and all references to "Agreement to Agree" therein are deemed to be references to "Work Order Contract" for purposes of this WOC except for references to "Agreement to Agree" in the second sentence of Section 1, Effective Date and Duration, in Section 3(a), Compensation, and in Exhibit A, Section H, Travel.

No Services shall occur until this Work Order Contract is signed by all parties and all necessary State of Oregon governmental approvals are obtained, and the Notice-to-Proceed is issued by the Agency.

WOC Expiration Date: [redacted]

DBE Goal (Does this WOC include federal funds? <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/>)	[redacted] %
ODOT Key # (or N/A)	# N/A
The authorized Not-to-Exceed compensation for this WOC (This amount includes \$ [redacted] for Contingency Tasks that must receive separate NTP)	\$

STATEMENT OF WORK and SUMMARY OF ESTIMATE FOR SERVICES are attached and incorporated by this reference.

Certification: The individual signing on behalf of Contractor hereby certifies and swears under penalty of perjury: (a) the number shown on the above-referenced Agreement to Agree is Contractor's correct taxpayer identification; (b) Contractor is not subject to backup withholding because (i) Contractor is exempt from backup withholding, (ii) Contractor has not been notified by the IRS that Contractor is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Contractor that Contractor is no longer subject to backup withholding; (c) s/he is authorized to act on behalf of Contractor, s/he has authority and knowledge regarding Contractor's payment of taxes, and to the best of her/his knowledge, Contractor is not in violation of any Oregon tax laws (including, without limitation, the state inheritance tax, gift tax, personal income tax, withholding tax, corporation income and excise taxes, amusement device tax, timber taxes, cigarette tax, other tobacco tax, 9-1-1 emergency communications tax, the homeowners and renters property tax relief program and local taxes administered by the Department of Revenue (Multnomah County Business Income Tax, Lane Transit District Tax, Tri-Metropolitan Transit District Employer Payroll Tax, and Tri-Metropolitan Transit District Self-Employment Tax).; and (d) Contractor is an independent contractor as defined in ORS 670.600.

CONTRACTOR

Name/Title Date

LEGAL Refer to Class Exemption from the Department of Justice dated June 24, 2003.
AGENCY

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Rob Rickard, Manager, Purchasing & Contract Management

Date

Michael Wolfe, Manager of Statewide Delivery Project

Date

DAS Refer to Delegation 008-99b from DAS dated June 28, 2002.

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**EXHIBIT A
STATEMENT OF WORK, BUDGET, AND DELIVERY SCHEDULE**

**WOC No.
ATA No.**

**Project Name: I-5 Columbia River Crossing Partnership:
Conceptual Engineering and Environmental Analysis**

This is a Land Use Planning Assignment

	Agency's Work Order Project Manager (WPM)		Contractor's Project Manager (PM)
Name:	Matt Garrett	Name:	
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A. BACKGROUND/OVERVIEW

The Strategic Plan approved at the end of the previous phase of the I-5 Transportation and Trade Partnership found that (i) the two-lane sections of I-5 between I-205 and Fremont Bridge should be upgraded to three lanes, (ii) the I-5 Columbia River crossing should provide five traffic lanes in each direction, and (iii) one or more of these lanes should be reserved for HOV or reversible lanes. The Strategic Plan and related documents specified several "Bridge Influence Area" design options (the "BIA Options") for accomplishing these objectives. These include, but are not limited to:

- 5-lane supplemental lift-span bridge (west of existing bridge) serving southbound traffic and five lanes of northbound traffic provided on existing bridge.
- 10-lane replacement fixed-span bridge.
- 4-lane supplemental lift-span bridge serving collector-distributor function with existing bridge providing six lanes of through freeway traffic.

These bridge/freeway options are considered with and without light rail transit (LRT) and some include HOV lanes. Concept drawings exist for many of these alternatives. Further, the previous studies examined No Build and Baseline alternatives that were used to assess the traffic, travel time, and economic benefits/impacts of the highway/bridge

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improvements; including such measures as representative travel times, hours of delay, etc.

The purpose of this Statement of Work (SOW) is to assist Agency and Agency's overall project contractor in scoping and analyzing highway/bridge improvement alternatives for the I-5 Columbia River Crossing Project. This SOW is intended to accomplish the following:

- Assist the Agency in identifying and resolving the status of freeway improvement alternatives and ramp configuration options examined in the Strategic Planning phase of study and identifying such alternatives and options that have not yet been studied but merit study;
- Document conceptual ramp, interchange and design-related reasons for recommending continued study or screening-out bridge and freeway improvement alternatives.
- Document environmental issues with the range of alternatives currently under study and the identification and documentation of environmental criteria and measures to be used to identify selected alternatives that will advance into the DEIS phase of project development.

B. TASKS

This section describes, on a task-by-task basis, the specific activities, products, and schedule for the Contractor and Agency. The task descriptions and deliverables employ the following conventions and principles:

- Three types of deliverable products are specified in this SOW:
 - **Technical Memoranda (TM)** that provide a comprehensive analysis of an issue specified in this SOW.
 - **Working Papers (WP)** that document interim findings or methodological conclusions, or are ad hoc or informal memoranda prepared in response to questions or meetings.
 - **Meeting Reports (MR)** that are written summaries of issues, management decisions, etc., identified or resolved at the formal meetings described under Task --. For meetings requiring preparation of an MR, unless stated otherwise in this SOW, Contractor shall also prepare and distribute a meeting agenda. Meeting agendas must be distributed to the Work Order Project Manager (WPM) at least two days prior to meetings unless a different timeframe is agreed to by Agency's WPM.
- Unless requested otherwise, Contractor shall provide one copy of all Technical Memoranda (TM), Working Papers (WP) and Meeting Reports (MR) to the WPM or his/her designee (a) electronically in Microsoft Word format for the Microsoft Windows NT or XP operating system and (b) in hard copy.

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- Wherever a TM or WP is shown as a deliverable, only the final product is shown as the deliverable. In all such cases, Contractor shall provide a draft of the TM or WP to the WPM for a five-business day review and comment period by Agency (unless additional time is agreed to between the WPM and Contractor), and Contractor shall revise the draft TM or WP based on such comments, as appropriate, and provide the final TM or WP to the WPM.
- Depending on the needs of the study process and meeting schedules, the WPM may request Contractor to prepare a TM or WP in two or more stages. Unless otherwise approved by the WPM, Contractor shall complete the final TM or WP in the series by the due date; ensuring that Agency receives the full product in accordance with the schedule.
- MRs and agendas will only be written for formal meetings. Informal or ad hoc meetings, emails, and phone calls, unless otherwise requested by Agency or where important project/program related decisions are made or action items are assigned, unless otherwise requested by Agency or deemed important by Contractor. Contractor is not required to write detailed meeting reports for informal or on-going coordination and oversight meetings or communications with sub-contractors where no project/program decisions are made or action items are assigned.
- Contractor shall provide regular monthly billing and progress reports.
- The budget shown for each task is the best estimate possible at this time. However, the study process may dictate that more funding be applied to some tasks and products and less to others. Contractor shall monitor such needs on an on-going basis and, when needed, propose budget refinements (within the limits of the not-to-exceed amount established for this WOC) to the WPM for his/her approval on a monthly basis as part of the invoicing and status report.
- The term "days" as used in this SOW refers to business days.

Task 1: Project Management

This task includes day to day management of the project, including scheduling, monitoring, and controlling the work. This task includes the oversight of schedules and budgets, review of work products, and the establishment of lines of communication between the WPM, interested agencies, and the Contractor. The WPM shall oversee the work of the Contractor, and coordinate the work of Agency and other interested agencies. The Contractor Project Manager shall manage the work of the consultant team and work closely with the WPM to coordinate related tasks by others.

The Contractor shall:

- Direct and supervise consultant team.
- Attend meetings, and prepare agendas and MR as described within the tasks.
- Prepare invoices and supporting data.

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- Coordinate with WPM, Agency, and other interested agencies.
- Prepare and update project schedule.
- Develop and maintain a project filing system.
- Prepare monthly progress reports, which will address current status, unresolved issues, projected significant milestones, project schedule, and major accomplishments during the month.

Products and Schedule for Task 0

Task No. 1	Product	Due Date NLT _____ from NTP
1.1	Prepare and update project schedule	2 weeks
1.2	Prepare invoices and monthly progress reports	Monthly

Task 2: Compile and Document Bridge and Approach Design Guidelines, Standards and Permitting Requirements

Purpose

The purpose of this task is compile and document in a technical memorandum Agency and WSDOT engineering-related guidelines and standards for bridges and approaches (including engineering, design and level-of-service). Further, this task is intended to identify and propose an approach for reconciling differences between Agency and WSDOT guidelines and standards.

- 2.1 Submit to Agency and WSDOT a written request outlining the source documents needed to complete this task, including, but not limited to: applicable bridge and approach design manuals; guidance and criteria; seismic design manuals, guidance and criteria; and interchange spacing and design standards. The request must specify the purpose of the request, the primary Contractor contact and the submittal deadline. Contractor shall compile submitted manuals, guidance and criteria.
- 2.2 Compile other source documents from other agencies/jurisdictions needed to complete this task, including, but not limited to, manuals, guidance and criteria that could affect bridge and approach design from: FHWA; AASHTO; City of Vancouver; City of Portland, Clark County; Multnomah County, BNSF, etc.
- 2.3 Evaluate the acquired applicable bridge and approach design manuals, guidance and criteria and document that evaluation in a technical memorandum. The memorandum must provide, at a minimum: an annotated bibliography of the acquired documents (e.g., source, date, summary of contents, critical elements); a brief topical assessment of the primary design requirements that will be placed on the I-5 Columbia river crossing bridge design; identification of any conflicting or

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potentially-conflicting design requirements; and proposed approach for reconciling any conflicting or potentially-conflicting design requirements.

- 2.4 Prepare a PowerPoint presentation and brief technical memorandum that summarizes the policy-level and significant design impacts related to the design manuals, guidance and criteria for bridges and approaches, and deliver that presentation and memorandum in three meetings.

Products and Schedule for Task 2

Task No. 2	Product	Due Date NLT _____ from NTP
2.3	TM 2.3: Evaluation of Design Guidelines & Criteria	2 weeks
2.4	TM 2.4: Summary of Design impacts	3 weeks

Task 3: Determine Extent of Conceptual Engineering Required to Identify and Screen Highway/Bridge Improvement Alternatives

The purpose of this task is to assess the improvement concepts from the previous phase of study to:

- Determine the extent to which they can be relied upon with regard to narrowing the road/bridge improvement alternatives; and
- Determine where more detailed work must be done to accomplish the screening of freeway/bridge alternatives to be accomplished in this phase of study.

- 3.1 Contractor shall review the conceptual engineering drawings and technical memoranda prepared for the previous phase of the I-5 Trade Corridor Partnership and assess if the drawings and results documented in the Strategic Plan, technical appendices, and background reports sufficiently reliable and detailed, or must more detailed concept drawings be prepared to identify, evaluate, and screen road/bridge improvement alternatives in this current phase of study.
- 3.2 Contractor shall assemble from Agency, WSDOT, Metro, and the Regional Transportation Commission (RTC) existing information on the I-205 river crossing, which was not considered in the previous stage of the I-5 partnership, and identify conceptual improvements for the I-205 Bridge and related freeway segments.
- 3.3 Contractor shall prepare a WP documenting findings from Tasks 3.1 and 3.2. The WP must describe each bridge/highway alternative examined during the Strategic Plan phase of study, the level of detail it was defined and evaluated, and the current status of the alternative. The WP must also describe:

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- (a) The association of freeway and interchange improvements with each of the bridge alternatives.
- (b) Alternatives that were discussed in the Strategic Plan phase that required study, or more study, but whose study was deferred to the next phase.

Products and Schedule for Task 3

Task No. 3	Product	Due Date NLT _____ from NTP
3.3	WP 3.3: Review of Conceptual Design Needs	4 weeks

Task 4: Refine Designs and Costs of Alternatives

Purpose

The purpose of this task is to refine the designs and costs of the alternatives currently under consideration to a level of detail needed to address the Project's design criteria and measures developed within this WOC to ensure a reliable Scoping process.

- 4.1 Summarize in a design, specification and costing approach technical memorandum that includes, at a minimum, the following:
 - the current level of detail of design drawings and specifications for each alternative currently under consideration;
 - a summary of the Project's evaluation criteria and measures that will depend on design drawings, engineering specifications and costs;
 - an assessment of deficiencies in the current design drawings, engineering specifications and costs for each alternative under consideration;
 - recommendations and methodologies for how any deficiencies should be addressed through refined design and costing;
 - describe how new concept designs identified in Task 3 will be developed;
 - and an approach for addressing the context sensitive design process (see Task 5 of this WOC).
- 4.2 Prepare a capital costing methodology technical memorandum that addresses the costing approach included within the design, specification and costing approach technical memorandum.
- 4.3 Prepare updated design drawings and engineering specifications that address the design, specifications and costing approach technical memorandum. Contractor shall include the following:
 - 4.3.1 A summary WP document of all design specifications and costing documents prepared for this task (categorized by alternative under consideration), including an assessment of all significant constructability

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issues identified and a description of how the context sensitive design process is incorporated into the current design;

- 4.3.2 A full set of sketch-level design drawings for each alternative, including:
 - 4.3.2.1 Four full-scale printed original of all sketch-level design drawings; and
 - 4.3.2.2 11"x17" schematic drawings for public displays and reports.
- 4.4 Prepare a summary cost report that includes: a summary of the costing methodology; a summary of capital costs for each alternative; an assessment of the potential sensitivity of costs to currently unknown variables (e.g. mitigation, phasing).
- 4.5 Prepare a PowerPoint presentation and presentation graphics that summarize the primary engineering, design and costing characteristics of the alternatives under consideration, based on the other products prepared within this task and WOC. The presentation graphics must include, but are not limited to: a street base map plan; simplified project-level alignments, interchange improvements, ramp configurations, bridges and structures; concept-level profiles of all bridge alternatives; schematics of major engineering concepts (e.g., phasing, lane configurations, etc.).
- 4.6 Prepare and deliver a total of six presentations on primary engineering, design and costing issues.
- 4.7 Respond to questions and requests for data related to design, engineering and costing from other contractors, agencies and jurisdictions.

Products and Schedule for Task 4

Task No.	Product	Due Date NLT _____ From NTP
4		
4.1	TM 4.1: Design, specifications & costing approach	5 weeks
4.2	TM 4.2: Capital costing methodology	5 weeks
4.3.1	WP 4.3.1: Summary design-spec document	3 months
4.3.2.1	WP 4.3.2.1: Concept Design Drawings	3 months
4.3.2.2	WP 4.3.2.2: Schematic Drawings	3 months
4.4	TM 4.4: Cost Report	3 months
4.5	WP 4.5: PPT Presentation	3 months

Task 5: Assist in Implementing the Context Sensitive Design Process

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Purpose

The purpose of this activity is to assist Agency and WSDOT in the implementation of the context sensitive design process. FHWA defines the primary principles of context sensitive design as:

- The project satisfies the purpose and needs as agreed to by a full range of stakeholders. This agreement is forged in the earliest phase of the project and amended as warranted as the project develops.
- The project is a safe facility for both the user and the community.
- The project is in harmony with the community, and it preserves environmental, scenic, aesthetic, historic and natural resource values of the area (i.e., exhibits context sensitive design).
- The project exceeds the expectations of both designers and stakeholders and achieves a level of excellence in people's minds.
- The project involves efficient and effective use of the resources (time, budget, community) of all involved parties.
- The project is designed and built with minimal disruption to the community.
- The project is seen as having added lasting value to the community.

The design and engineering refinement effort for the I-5 project must meet these objectives and it must address FHWA's and WSDOT's guidance on context sensitive design (*Flexibility in Highway Design* (FHWA-PD-97-062); and *Building Projects that Build Better Communities - Recommended Best Practices* (WSDOT 2003). This task must also be done in coordination with and support the context sensitive design task to be performed by the Project's public involvement contractor. Fundamental to this task is the assembly, staffing and documentation of an all day public workshop to review and assess the project's objectives and alternatives within the perspective of context sensitive design.

- 5.1 Prepare a detailed context sensitive design work plan for the project, focusing on the refinement of the design of the alternatives under consideration in the study, including the identification of any design criteria and measures to be used for selecting alternatives that should reflect context sensitive design goals and objectives. Preparation of the work plan shall include close coordination with the Project's citizen involvement contractor. The work plan must directly address the goals, objectives and primary components of a context sensitive design process described in *Flexibility in Highway Design* (FHWA-PD-97-062) and *Building Projects that Build Better Communities - Recommended Best Practices* (WSDOT 2003).
- 5.2 Arrange, manage, participate in, prepare presentation materials for and document a one-day work session of the context sensitive (meeting room and equipment to be provided by Agency and WSDOT).

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- 5.3 Prepare a technical memorandum that summarizes the context sensitive design process, activities and results.

Products and Schedule for Task 5

Task No.	Product	Due Date NLT _____ from NTP
5		
5.1	WP 5.1: Context Sensitive Design Work Plan	Week 4
5.2	Conduct Work Shop	3 months
5.3	TM 5.2: Summary of process and results	1 week following work shop

Task 6: Environmental Considerations of Alternatives

The purpose of this task is to provide environmental considerations services in support of the identification and screening of alternatives. This task will result in:

- The identification of resource and environmental oversight agencies to be involved in the Project's early coordination and Federal Scoping process;
- The identification and documentation of environmental issues with the range of alternatives currently under study and the identification and documentation of environmental criteria and measures to be used to identify selected alternatives that will advance into the DEIS phase;
- A critical analysis of the issues related to the range of alternatives currently under study and the analysis and documentation of the environmental criteria and measures that will be used to identify the selected alternatives that will advance into the DEIS phase;
- Assistance to Agency and WSDOT during the Federal Scoping process, including preparation for the Scoping meetings; addressing and documenting environmentally-related questions and comments received during the Scoping process and documenting the comments and responses.
- The identification, analysis and documentation of additional environmental assessments needed to properly define the alternatives selected to advance into the DEIS.
- The identification, assembly and documentation of environmental-related data bases, documents, maps, figures, etc., to be used in the preparation of the Project's DEIS.

Task 6.1: Identify Resource and Environmental Oversight Agencies

- 6.1.1 Request from Agency, WSDOT and other participating jurisdictions/agencies copies of all Project environmental data, maps and documentation prepared in prior phases of the project.

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- 6.1.2 Review that material and identify environmental resource and oversight agencies that have communicated an interest in the Project's environmental analysis, have been contacted by Project staff and/or have been involved in the prior environmental analysis for the Project.
- 6.1.3 Prepare a Technical Memorandum reporting the results of that document and data survey that provides a chronological summary of those contacts, categorized by agency.
- 6.1.3.1 Contractor shall identify within the technical memorandum any other environmental resource or oversight agency that should be involved in the Project, Scoping or preparation of the DEIS for the Project.
- 6.1.3.2 Contractor shall include within the technical memorandum a strategy and timetable for the initial and continued involvement of all identified environmental resources agencies during this, Scoping and/or DEIS phases of the Project.
- 6.1.3.3 The technical memorandum must include an alphabetical listing of the identified agencies, with street and Web site addresses and the names, titles, phone numbers (voice and facsimile) and e-mail addresses of the primary staff contacts at each identified agency (the agency and staff listing shall be documented in a mailing list database and mail merge document, to be maintained and updated monthly by Contractor throughout the duration of this SOW and Scoping).
- 6.1.4 Prepare individualized letters of introduction and orientation mailing packets for each of the agencies identified in the technical memorandum. At a minimum, the packets must include:
- a brief description of the Project (emphasizing its current problem statement and range of alternatives);
 - a conceptual description of the Project's current decision-making, environmental review process and schedule through to publication of a record of decision;
 - a listing of project participants (including the Federal lead and cooperating agencies) with contact information for the Project's primary staff;
 - a brief description of environmental analysis completed and documented to date (with information on how to access that prior documentation); and
 - an invitation to participate in an environmental open house and work session with RSVP requested (see below).
 - The packets shall be prepared, printed/copied and assembled by Contractor for review and approval by Agency and WSDOT – Agency, WSDOT or their designee shall authorize distribution of the packets and will sign the packet's introductory cover letter, to be drafted by Contractor.

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- Contractor shall have the approved packets distribute to the appropriate agency.
- 6.1.5 Prepare for, manage, participate in and document the Project's environmental resource and oversight agency open house and work session, as announced in the orientation packets referenced above. Agency and WSDOT shall provide the meeting room and equipment. All other aspects of the meeting shall be arranged and managed by Contractor, including, but not limited to:
- scheduling the time, date and duration of the open house and work session;
 - preparation and copying of presentation material; agenda; presentation, participation and/or attendance assignments for Project agency and contractor staff; and meeting notes (all subject to Agency, WSDOT or their designee approval of drafts and/or recommendations).
 - Contractor shall contact via telephone the primary staff contact for each agency to determine participation in the open house work session (to occur no more than two weeks and no less than one week prior to the open house and work session. The primary purpose of the open house and work session will be to review the draft environmental oversight and resource agency technical memorandum and to agree upon the appropriate level and timing of involvement of the agencies in the Project's environmental process.
- 6.1.6 For Scoping, catalogue and document all contacts (e.g., mail, significant e-mail, meetings, conference calls and significant two-person phone calls) between Agency, WSDOT and any environmental resource or oversight agency. The contact information shall be included in a database that shall be updated monthly by Contractor.
- 6.1.7 Assist Agency, WSDOT and/or their designees in integrating Native American tribes during this SOW and Scoping for the Project, either:
- through its involvement in the process described above for environmental resource and oversight agencies; or
 - by creating and implementing an individualized process for tribal notification and involvement.

Task 6.2: Identify Environmental Issues and Criteria and Measures and Prepare Environmental Methodology and Analysis

- 6.2.1 Review the environmental-related documents compiled in Task 6.1 of this WOC (as well as the *Strategic Plan* (June 2002)) to determine the scope of significant environmental issues and potential impacts identified to date for the alternatives under consideration.

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- 6.2.2 Contractor shall prepare a brief technical memorandum that outlines those significant environmental concerns.
- 6.2.3 Prepare a technical memorandum that identifies the environmental criteria and measures to be used in the Project to evaluate and screen the alternatives to advance into the Project's DEIS. Based on the findings within the *Final Strategic Plan*, those criteria and measures must address, at a minimum:
- fish habitat associated with bridge construction (potential short and long-term impacts);
 - potential impacts to 6 (f) and 4(f) resources;
 - potential displacement of wetlands;
 - potential displacements;
 - potential land use impacts.

The selected criteria must allow for the differentiation between the alternatives and must be measurable given the level of detail of design and traffic analysis.

- 6.2.4 For each of the identified measures, Contractor shall prepare a methodology, identifying the required data necessary to assess the given measure for each alternative to be evaluated with that criterion.
- 6.2.5 Conduct the analysis necessary to produce the various criteria and measures for each alternative under consideration and prepare an environmental considerations technical memorandum that summarizes the results of the analysis. The memorandum must also include:
- a summary description of the alternatives under consideration;
 - the evaluation criteria and measures and the methods used to assess those criteria and measures; and
 - a summary comparative description of the criteria and measures for each alternative under consideration.
- 6.2.6 Prepare and deliver, in six meetings, a PowerPoint presentation summarizing the findings within the environmental considerations technical memorandum.

Task 6.3: Assist Agency during the Federal Scoping Process

- 6.3.1 Based on the set of alternatives recommended to advance into Scoping and ultimately the DEIS, prepare a summary technical memorandum of the scope of anticipated or potential impacts that could be associated with those alternatives and that would be studied within the Project's DEIS. This scope of impacts must reflect the environmental analysis and design work to date, public comment received on the alternatives and current Federal, state and local environmental regulations affecting the content and scope of a DEIS. The purpose of the memorandum will be to provide a description of the scope of the DEIS analysis,

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to be included in the application to the Federal lead agency requesting the issuance of a letter of intent to Scope and to publish an EIS for the project.

- 6.3.2 Contractor shall prepare and provide a two-page summary sheet for the Scoping meetings that outlines the scope of anticipated and potential environmental impacts to be studied in the DEIS.
- 6.3.3 Provide environmental analysis assistance during the Federal Scoping phase of the project, including the preparation of additional presentation material, summary and illustrative graphics, drawings and maps, brief summary reports (two to four pages), oral and written responses to questions/comments received from project staff, interested agencies, project decision makers and committees and/or the public and modifications to environmental documents prepared in Task 6.2.
- 6.3.4 Preparation of environmental-related presentation and display material to be displayed and/or distributed at the Project Scoping meetings, including, but not limited to the following for the alternatives selected to advance into the DEIS phase:
 - a two-page WP summary of environmental impacts associated with the selected alternatives;
 - one 24"x36" (approximate) color display boards illustrating the primary impacts associated with each alternative recommended to advance into the DEIS.
- 6.3.5 Prepare a summary technical memorandum that provides written responses to all environmental-related comments/questions received during the Project Scoping period, citing the comment made, the source and date made and the Project response (similar comments may be grouped together with a single response).

Task 6.4: Identify, Analyze and Document Environmental Issues to Prepare for the DEIS

- 6.4.1 For each significant potential or anticipated environmental impact, prepare a technical memorandum that describes ways in which the design or other characteristic of each alternative selected to advance into the DEIS could be modified to avoid, minimize or mitigate the potential or anticipated impact(s) of that alternative – modifications to the design of the selected alternatives will occur as a first step of the DEIS phase.

Task 6.5: Preparation of Environmental Data and Documentation to Support Preparation of the DEIS

- 6.5.1 Consolidate and catalogue in a technical memorandum all environmental data, technical memoranda, presentation material and other related documentation

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prepared during this SOW and Scoping, for transfer to the contractor(s) selected by Agency and WSDOT to prepare the environmental analysis for the DEIS.

Products and Schedule for Task 6

Task No. 6	Product	Due Date NLT _____ From NTP
6.1.3	TM 6.1.3: Environmental Documentation & Data	Week 2
6.1.4	WP 6.1.4: Orientation Materials	Week 5
6.1.5	WP 6.1.5: Open House Documentation	1 week following open house
6.1.6	WP 6.1.6: Catalog of Contacts	Updated monthly
6.2.2	TM 6.2.2: Significant Environmental Concerns	Week 4
6.2.3	TM 6.2.3: Environmental Criteria & Measures	Week 5
6.2.4	TM 6.2.4: Methodology	Week 5
6.2.5	TM 6.2.5: Environmental Considerations	3 Months
6.2.6	WP 6.2.6: PPT Presentation	3 Months
6.3.1	TM 6.3.1: Summary of Impacts	5 Months
6.3.2	WP 6.3.2: Scoping Sheet	8 Months
6.3.3	WP 6.3.3: Summary, graphics, drawings, & maps	9 Months
6.3.4	WP 6.3.4: Summary of Environmental Impacts	9 Months
6.3.4	(8) Color Display Boards	1 Week prior to Scoping
6.3.5	TM 6.3.5: Response to Comments/Questions	1 Week following Scoping
6.4.1	TM 6.4.1: (8) Avoid, Minimize, Mitigate reports	11 Months
6.5.1	TM 6.5.1: Environmental Summary Report	11 Months

Task 7: Evaluate Alternatives

The impacts of the concepts and alternatives shall be assessed by comparison to the No Build and Baseline alternatives developed for the Strategic Plan, where applicable, and by comparison to each other.

Task 7.1: Evaluate the Alternatives for Selection Using Design Criteria and Measures

Purpose

The purpose of this task is for Contractor to prepare and propose to Agency and WSDOT design criteria and measures to be used to identify and select a range of alternatives to

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advance into the DEIS and to participate in the evaluation of the current set of alternatives based on those criteria and measures. The criteria and measures must also address and be supportive of the Project's context sensitive design process, described in Task 5 of this WOC.

7.1.1 Contractor shall prepare a technical memorandum describing environmental and design criteria and measures for limiting the range of alternatives currently under study to advance into the DEIS phase. The proposed criteria must equitably address all modes of travel included within the alternatives under study and must address tolling I-5 or I-5 and I-205.

7.1.2 Contractor shall participate with other contractors, Agency staff, and others, in the evaluation of alternatives, analyzing the alternatives based on the approved evaluation criteria and measures, and prepare a technical memorandum that summarizes the results of that analysis. Consultant shall participate in six meetings to present the findings of the analysis.

Products and Schedule for Task 7

Task No.	Product	Due Date NLT _____ From NTP
7		
7.1.1	TM 7.1.1: Evaluation Criteria & Measures	5 Months

Task 8: Provide Technical Assistance During Scoping

Purpose

The purpose of this task is for Contractor to provide design and environmental assistance during the Federal Scoping phase of the project. Scoping for the Project will include the recommended range of alternatives to advance into the DEIS phase of the Project. This task is intended to provide environmental, design and engineering-related services for that selected range of alternatives, to address questions and issues raised during the Scoping process, including, but not limited to: design refinement; constructability; costing; construction phasing and schedule; short-term and long-term areas of impact; construction impacts; etc. This task involves participation in the three Project Scoping meetings and follow-up responses to issues raised at those meetings.

8.1 Provide design assistance during the Federal Scoping phase of the project, including the preparation of additional presentation material, summary and illustrative graphics, drawings and maps, brief summary reports (four pages), oral and written response to questions/comments received from project staff, interested agencies, project decision makers and committees and/or the public and modifications to design documents prepared in Task 4.

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- 8.2 Preparation of design, engineering and cost-related presentation and display material to be displayed and/or distributed at the Project Scoping meetings, including, but not limited to the following for the alternatives selected to advance into the DEIS phase: a two-page summary of capital and operating cost estimates; a four-page summary of the bridge designs; 11"x15" illustrations of each alternative conceptual design configuration; 24"x36" (approximate) color display boards of the computer renditions prepared in Task 2; full-scale roll-maps of each alternative, based on the design drawings prepared in Task 2); and other products requested by Agency.
- 8.3 Prepare a summary memorandum that provides written responses to all design, engineering and costing-related comments/questions received during the Project Scoping period, citing the comment made, the source and date made and the Project response (similar comments may be grouped together with a single response).

Products and Schedule for Task 8

Task No. 8	Product	Due Date NLT _____ from NTP
8.1	WP 8.1: Presentation Materials	1 week prior to first Scoping meeting
8.2	WP 8.2: Selected Alternatives Materials	1 week prior to first Scoping meeting
8.3	WP 8.2: Response to Comments/Questions	1 week after close of comment period

Task 9: Final Report, Public Review and Continuing Assistance

Task 9.1: Final Report on Results of Evaluation

Contractor shall prepare a FR documenting the results and recommendations from Task 10. The FR shall also include an executive summary with appropriate color graphics. Ten copies of the FP shall be produced along with a CD that can be used to either produce additional paper copies or CD's for distribution.

Task 9.2: Participate in Meetings with Technical Staff, Policy-Makers and Public Involvement

WORKING DRAFT

Prepare for and participate in meetings with technical staffs from participating governments, policy-makers, and public involvement. For budgeting purposes, there are estimated to be four agency meetings and two public meetings.

Task 9.3: Provide Continuing Technical Assistance

Assist WPM in addressing questions arising during this phase of study from technical staffs of participating governments, policy-makers, and public involvement. For budgeting purposes, the level of involvement is estimated not to exceed 180 hours.

Products and Schedule for Task 9

Task No. 9	Product	Due Date NLT _____ From NTP
9.1	TM 11.1: Final Report on Results of Evaluation	9 Months
9.2	MR 11.2: Meeting Materials	12 Months
9.3	WP 11.3: Working Papers as Requested by WPM	12 Months

Task 10 Monthly Progress Reports

Contractor shall prepare monthly progress reports that track project scope, schedule and budget, and:

- Include description of the previous month’s project activities, meetings facilitated/attended, and the planned activities for the next month.
- Record of important project/program related decisions made and action items assigned during ad hoc meetings and communications (report must include dates and participants).
- Identify issues and/or concerns that affect the project SOW, schedule, and/or budget.
- Indicate the percentage of each task completed, and reconcile the percentage of the total work completed versus the percentage of the not-to-exceed amount billed to date.

Task No.	Product	Due Date
10	Progress Reports (submit with monthly invoice)	NLT 5 th of each month

C. DELIVERABLES AND SCHEDULE

Task No. 1	Product	Due Date NLT _____ from NTP
1.1	Prepare and update project schedule	2 weeks
1.2	Prepare invoices and monthly progress reports	Monthly
2.3	TM 2.3: Evaluation of Design Guidelines & Criteria	2 weeks

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Task No. 1	Product	Due Date NLT _____ from NTP
2.4	TM 2.4: Summary of Design impacts	3 weeks
3.3	WP 3.3: Review of Conceptual Design Needs	4 weeks
4.1	TM 4.1: Design, specifications & costing approach	5 weeks
4.2	TM 4.2: Capital costing methodology	5 weeks
4.3.1	WP 4.3.1: Summary design-spec document	3 months
4.3.2.1	WP 4.3.2.1: Concept Design Drawings	3 months
4.3.2.2	WP 4.3.2.2: Schematic Drawings	3 months
4.4	TM 4.4: Cost Report	3 months
4.5	WP 4.5: PPT Presentation	3 months
5.1	WP 5.1: Context Sensitive Design Work Plan	Week 4
5.2	Conduct Work Shop	3 months
5.3	TM 5.2: Summary of process and results	1 week following work shop
6.1.3	TM 6.1.3: Environmental Documentation & Data	Week 2
6.1.4	WP 6.1.4: Orientation Materials	Week 5
6.1.5	WP 6.1.5: Open House Documentation	1 week following open house
6.1.6	WP 6.1.6: Catalog of Contacts	Updated monthly
6.2.2	TM 6.2.2: Significant Environmental Concerns	Week 4
6.2.3	TM 6.2.3: Environmental Criteria & Measures	Week 5
6.2.4	TM 6.2.4: Methodology	Week 5
6.2.5	TM 6.2.5: Environmental Considerations	3 Months
6.2.6	WP 6.2.6: PPT Presentation	3 Months
6.3.1	TM 6.3.1: Summary of Impacts	5 Months
6.3.2	WP 6.3.2: Scoping Sheet	8 Months
6.3.3	WP 6.3.3: Summary, graphics, drawings, & maps	9 Months
6.3.4	WP 6.3.4: Summary f Environmental Impacts	9 Months
6.3.4	(8) Color Display Boards	1 Week prior to Scoping
6.3.5	TM 6.3.5: Response to Comments/Questions	1 Week following Scoping
6.4.1	TM 6.4.1: (8) Avoid, Minimize, Mitigate reports	11 Months
6.5.1	TM 6.5.1: Environmental Summary Report	11 Months
7.1.1	TM 7.1.1: Evaluation Criteria & Measures	5 Months
8.1	WP 8.1: Presentation Materials	1 week prior to first Scoping meeting

WORKING DRAFT

Task No. 1	Product	Due Date NLT _____ from NTP
8.2	WP 8.2: Selected Alternatives Materials	1 week prior to first Scoping meeting
8.3	WP 8.2: Response to Comments/Questions	1 week after close of comment period
9.1	TM 11.1: Final Report on Results of Evaluation	9 Months
9.2	MR 11.2: Meeting Materials	12 Months
9.3	WP 11.3: Working Papers as Requested by WPM	12 Months
10	Progress Reports (submit with monthly invoice)	NLT 5 th of each month

D. ACRONYMS

Agency/ODOT	Oregon Department of Transportation
AA	Alternatives Analysis
ATA	Agreement to Agree
C-TRAN	Clark County Transit District
DEIS	Draft Environmental Impact Statement
EIS	Environmental Impact Study
FEIS	Final Environmental Impact Statement
FHWA	Federal Highway Administration
FTA	Federal Transit Administration
GMA	Growth Management Act
HOV	High Occupancy Vehicle
ICCP	Intergovernmental Coordination and Communications Plan
LRT	Light Rail Transit
IPP	Agency's Innovative Partnerships Program
MPO	Metropolitan Planning Organization
MOS-1	Minimum Operable Segment No. 1
MR	Meeting Reports
NEPA	National Environmental Policy Act
NTE	Not to Exceed
NTP	Notice to Proceed
PE	Preliminary Engineering
PPP	Public-Private Partnership
PPT	Power Point Presentation
RFP	Request For Proposals
RTC	Regional Transportation Commission

WORKING DRAFT

SEPA	State Environmental Policy Act
SOW	Statement of Work
TDM	Transportation Demand Management
T&M	Time and Materials
TM	Technical Memoranda
TriMet	Tri-County Metropolitan Transportation District of Oregon
TSM	Transportation System Management
TSUB	Transportation System User Benefits
WOC	Work Order Contract
WP	Working Paper
WPM	Agency's Work Order Project Manager
WSDOT	Washington Department of Transportation

E. SUMMARY OF ESTIMATE FOR SERVICES

See attached Fee Estimate.

F. COST AND METHOD OF COMPENSATION

Total Not To Exceed (NTE) payable to Contractor is:

All Compensation under this WOC is on a Time and Materials (T&M) basis and is only for the tasks identified for this Phase 1 work up to the NTE amount stated in the Compensation section on page 1. **No compensation is provided to Contractor for negotiations, preparing or revising cost estimate for services, or negotiating contracts with subcontractors.** Invoices for T&M work must include an attached breakdown of actual hours (as detailed in the ATA), identifying staff, and classification by task and allowable direct non-labor costs.

Himes, Dale

From: Geoff Larkin [LarkinGroupInc@comcast.net]
Sent: Tuesday, December 09, 2003 12:39 PM
To: John Rosenberger; Matt Garrett
Cc: Steve Siegel; Dale Himes
Subject: I-5 River Crossing SOW

~~FORWARD~~

- Task 9 does not apply
- Comments before, during or after meeting
- Task 4 is other consultants
- Larkin will manage consultants & perform all other tasks.

Matt,

It is my pleasure to forward the draft SOW for the I-5 River Crossing Project for your review (*SOW WOC#2 Draft to ODOT.doc*). It has been refined to reflect the comments received last week from Agency and WSDOT staff, adds deliverables, including a context sensitive design task, and further clarifies Contractor and Agency roles and responsibilities.

The schedule detailing when each deliverable will be submitted to the Agency and WSDOT is also included, as is a Summary Budget (*SOW WOC#2 Budget to ODOT.xls*). The budget is task-based, and includes hours per task and by contractor and sub consultant. Although the Agency has not established a DBE goal for this WOC, our submittal achieves 10.72% DBE participation.

The WOC No. 2 draft contract documents are also attached (*Cover Sheets-WOC#2.doc*)

Please forward all the attachments to the appropriate Agency staff for their review. By copy I also request that Dale Himes immediately forward the attachments to appropriate WSDOT staff.

Per our Agreement, two weeks have been allotted for Agency review, and we look forward to receiving your comments by 12/24. We will then revise the documents as necessary and submit a final WOC #2 by 12/31.

If you have questions as you review these documents, please don't hesitate to contact me, or, in my absence, Steve Siegel (503.99.0902). I will be traveling December 19th through 26th but will stay in direct touch with Steve.

The team is pumped and ready to tackle the enormous amount of work before us, and we are looking forward to an NTP very early in January 2004.

Geoff Larkin
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12/9/2003