

Sharing Solutions: Pathways to Success

Certification User Group
Summer Work Session
June 25, 2024





CUG Co-chairs

Tiffany Hamilton, ODOT

Ryan Crowther, Marion County





Objectives

- **Provide CUG program and policy updates**
- **Provide policy and funding updates**
- **Share new tools to help certified LPA's deliver projects**
- **Progress work items (focus on the LAG updates)**
- **Encourage interaction and networking**



AGENDA

8:30 am	Informal Networking – Connect with others!
9:00 am	Welcome and Agenda Review
9:10 am	CUG Business & Certification Program Updates
9:45 am	Policy and Funding Update
10:15 am	Critical Path Resource Tool
10:30 am	BREAK – Informal Networking and Transition Period
10:45 am	LAG Update Focus Groups (Pick one!) <ul style="list-style-type: none">• Consultant Selection• Right of Way• Utility and Railroad
12:00 pm	LUNCH
1:15 pm	LAG Update Focus Groups (Pick one!) <ul style="list-style-type: none">• Access Management• Bridge Design Qualifications for Certification• NEPA & Environmental
2:30 pm	BREAK – Informal Networking and Transition Period
2:45 pm	Summary and Next Steps – from focus groups
3:15 pm	Roundtable Discussion: Local Agency Projects
4:00 pm	Closing Comments
4:10 pm	Adjourn





Introductions

- Welcome First Timers
- Agency Roll-Call





Connect

Within your table, have each person share:

- Name
- Role
- Connection to the Certification Program
- Answer ONE of the following questions:

How long have you been involved with the CUG?

What has been most valuable to you or your agency?

If you're new to the CUG, what do you hope to gain?



CUG Business Meeting



**Recognize
Partnering**



**CUG
Mission & Goals**



**Steering
Committee
Updates**





Certification User Group Mission

Streamline and improve the delivery of certified local public agency federal aid transportation projects for Oregon by:

- Recommending and coordinating training to improve understanding of regulations, requirements, and processes;
- Providing a forum for sharing information and best practices;
- Facilitating ongoing communication and further development of relationships within and among ODOT, federal agencies, and local public agencies; and
- Providing a means for ODOT and local public agencies (LPAs) to improve coordination and efficient use of resources.





CUG Goals

- Achieve a high percentage of projects completed on schedule.
- Promote full obligation of program funds to projects.
- Enable agencies to obtain and/or maintain certification.
- Provide resources to support successful delivery of projects (tools, guidance, training, checklists, etc.)
- Promote understanding of compliance issues and identify trends to increase the success of local agencies.
- Update and streamline standards to simplify compliance and reduce ODOT Oversight.



CUG Steering Committee 2024:

Tiffany Hamilton, ODOT (co-chair)

Ryan Crowther, Marion County (co-chair)⁺

Mark Hardeman, ODOT R1^{*}

Kate Dreyfus, City of Gresham

Greg Stellmach, ODOT HQ⁺

Emily Miletich, Multnomah County^{*}

Ted Leybold, OR Metro

Katie Marwitz, City of Eugene⁺

Drake McKee, ODOT R2

Satvinder Sandhu, FHWA

^{}New to the Steering Committee starting in 2024.*

⁺Term expires/renews end of 2024.





Certification Program Updates Overview

Tiffany Hamilton, Certification Program Manager

- Certification Program Participant Summary
- Bulletins issued since Dec 2023
- Bulletins anticipated July-Dec 2024
- Other ongoing program work in 2024



Certification Program Participation

Certified LPAs: 14

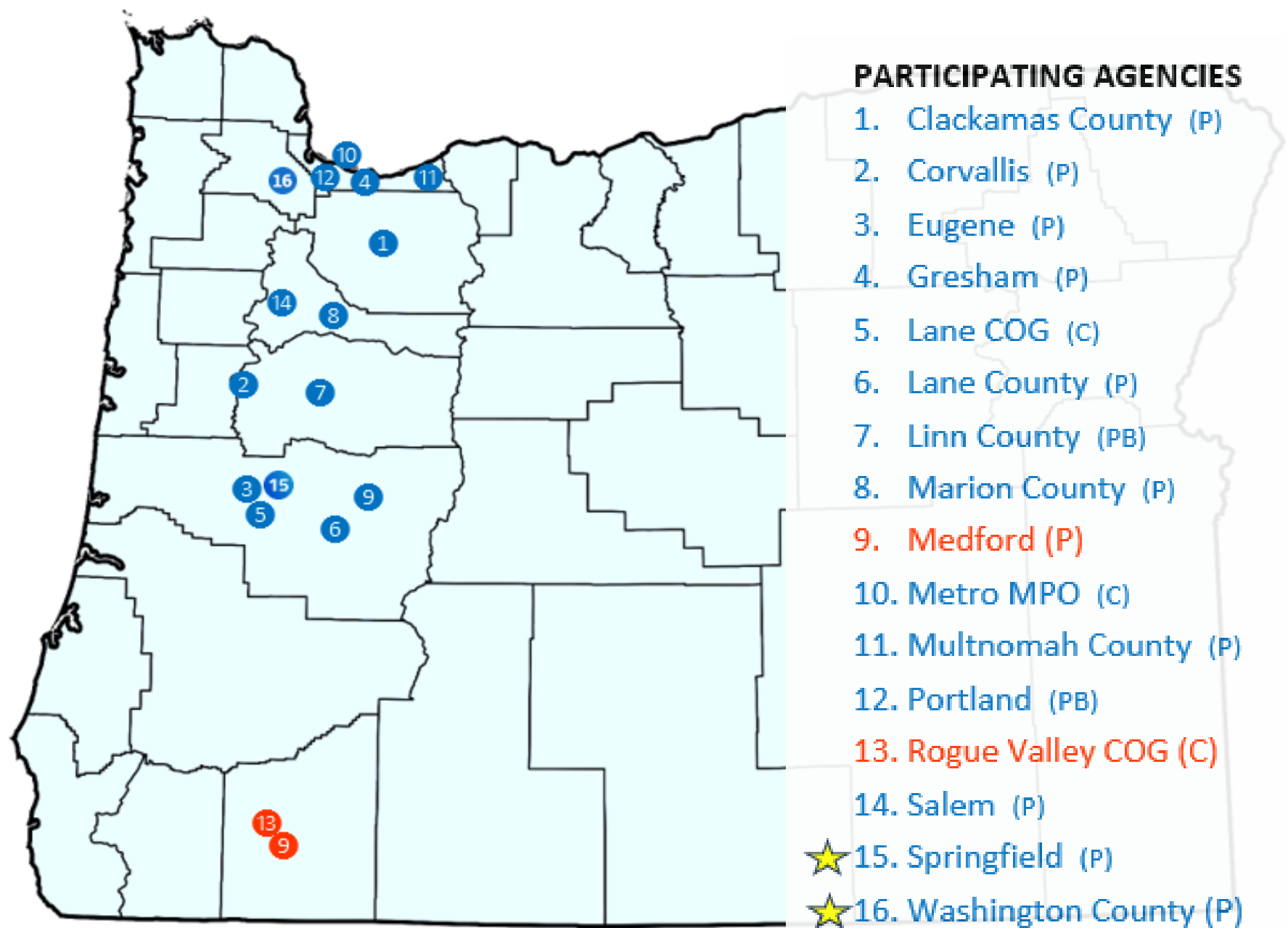
6 Cities, 6 Counties, 2 MPOs

Pending Certification: 2

2024-27 STIP Projects

- 117 Certified LPA
- 6 COBO
- \$600 M

STIP-FP data as of 6/24/24



Certification Types:

(P) Project Delivery (PB) Project Delivery + Bridge Design (C) Consultant Selection for Planning Services only



Certification Program Updates June 2024

Bulletins Issued since December 2023

- 101_67: LAG Manual Update Survey (Jan)
- 101_68: Americans with Disabilities Act, Transition Plan Requirements & Guidance (Feb)
- 101_69: Teams Guest Access (Feb)
- 101_70: ODOT Expenditures Report (Feb)
- 101_71: Certification Program Agreement Update (Apr)
- 101_62-rev-2: Certified LPA Self-Audits (Apr) ✨





Certification Program Work Underway 2024

Anticipated Bulletins:

- 101_66-rev-1: General Conditions Template, BP Updates (July)
- 101_62-rev-2: Build America, Buy America (July)
- 101_47-rev-5: Title VI Program/Annual Accomplishments (Aug/Sep)
- 101_53-rev-3: Indirect Costs Rate Approvals (Sep)
- 101_TBD Consultant Selection: Template Updates (Nov/Dec)
- 101_TBD Local Agency Guidelines Manual Update (Dec)



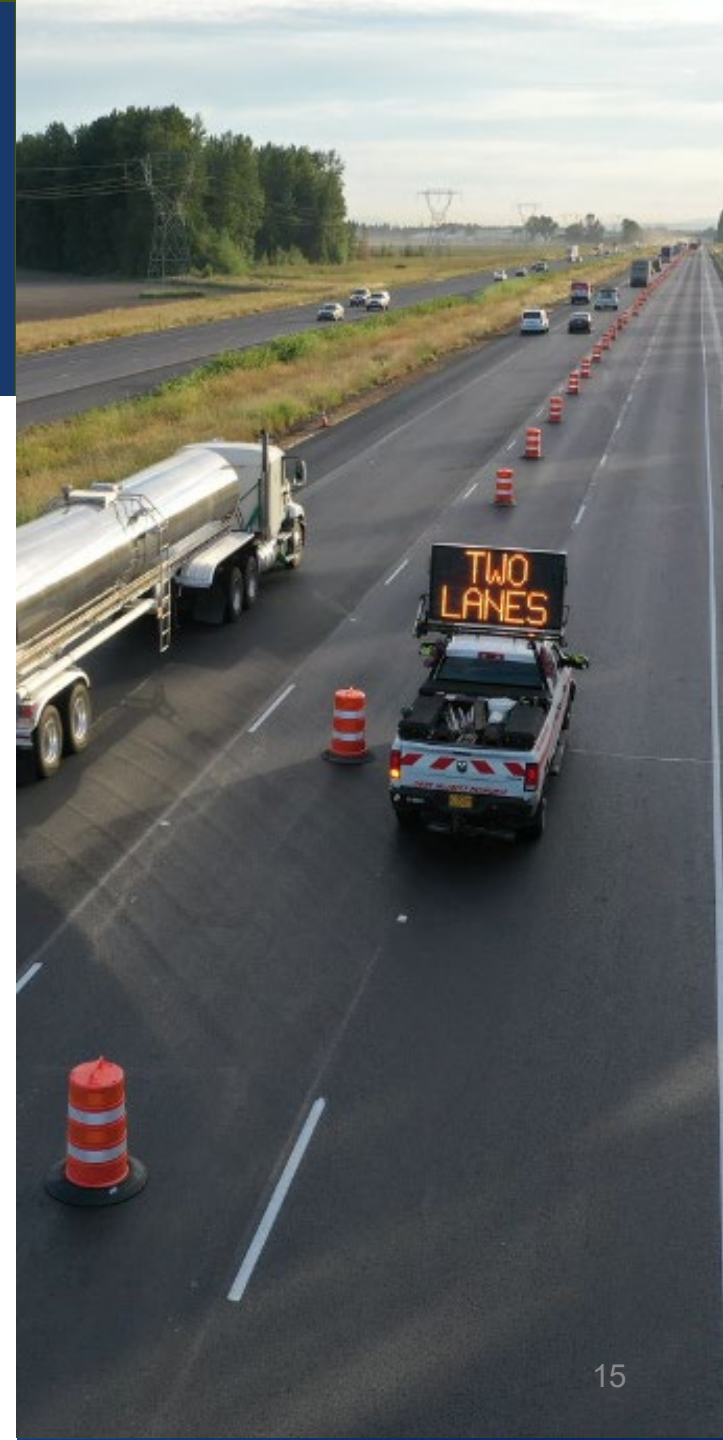
More Certification Program Work Underway 2024

2024 Construction Contracting Templates Reviews:

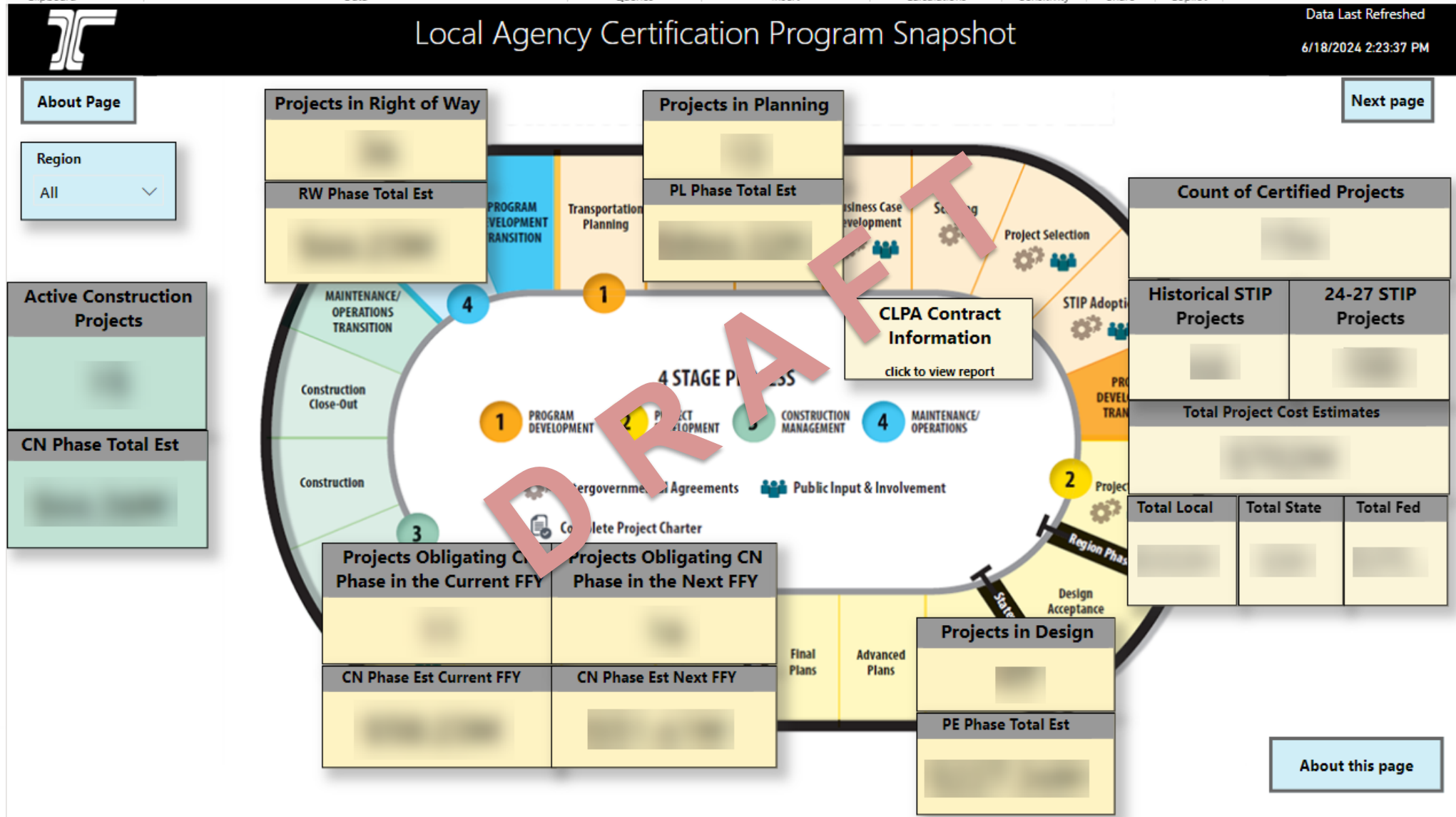
- 4 Approved: Linn Co., Marion Co., Gresham, Portland
- 6 Under review: Lane Co., Multnomah Co., Washington Co., Medford, Eugene, Springfield
- 3 TBD: Clackamas Co., Salem, Corvallis

2024 Compliance Reviews

- Anticipated within next 3 months: Marion Co., Eugene, Portland, Washington Co. (Consultant Contract Administration demo)
- Anticipated by end of 2024: Gresham, Clackamas Co., Lane Co., Salem



Sample Certification Program Work Underway 2024





CUG

Subcommittee

Updates

Standards

Leads:

- Tiffany Hamilton, ODOT
- Olaf Sweetman, Lane County

Liaison: Tiffany Hamilton, ODOT

Process Improvement & Training

Leads:

- Paul Rudwick, City of Portland
- Hanne Eastwood, ODOT

Liaison: Mark Hardeman, ODOT





**Jeff Flowers, ODOT
Statewide Investment Management Section Manager**

Policy and Funding Updates





Agenda for Policy and Funding Updates

- ODOT Budget Issues
- State Funded Local Program (SFLP)
- Fund Exchange
- 27-30 STIP Timeline
- Statewide Investments Organizational Update





ODOT Budget Issues

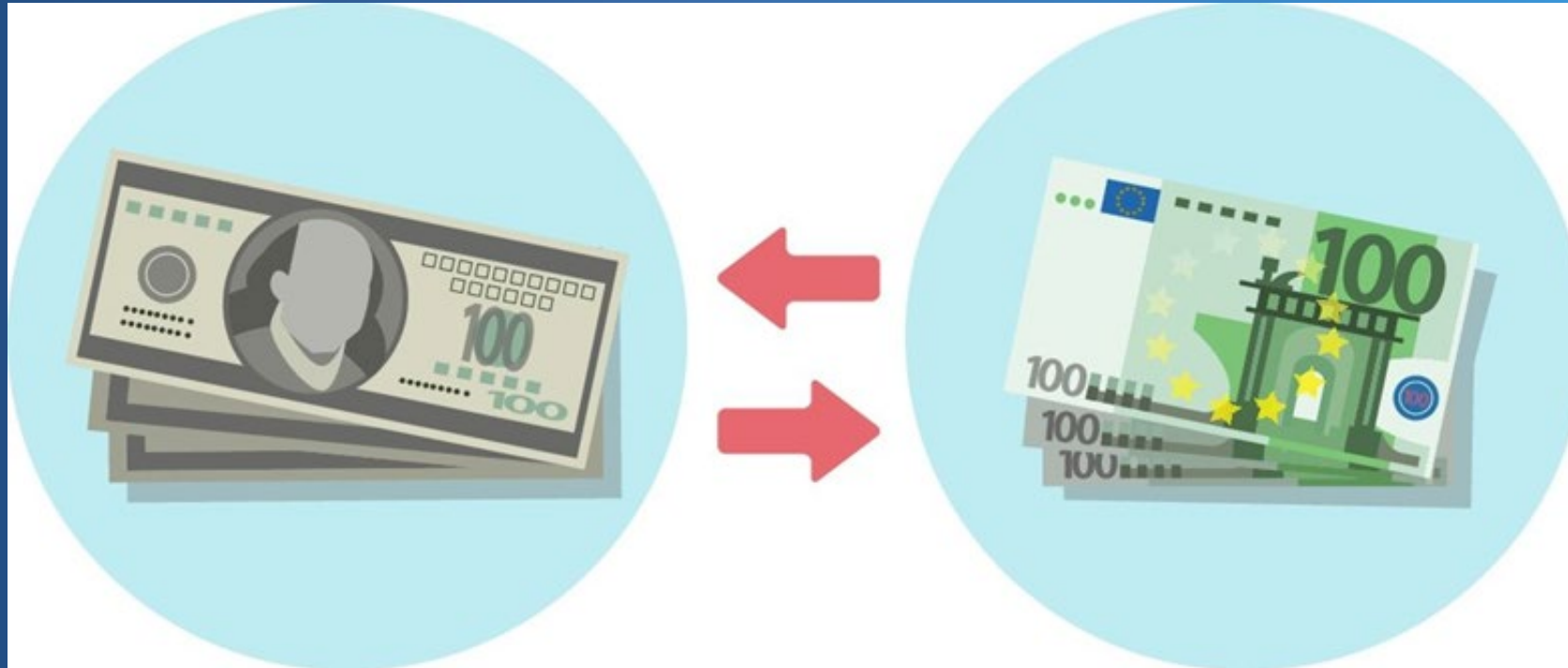


State Funded Local Program (SFLP)

- Continuing but may have more tightening
- Only Local Bridge
- Off-system review



Fund Exchange



- Off and running

- \$35M/year





27-30 STIP Process – Part 1

- November 2023 – Funding allocations approved by OTC
- December '23 – June '24 – internal work for scoping preparation
- July '24 – March '25 – Field Scoping
- April '25 – May '25 – Final project selection (Was July '25)
- June '25 – August '25 – Draft STIP project entry





27-30 STIP Process – Part 2

- August '25 – September '25 – ODOT review Draft STIP for balancing
- October '25 – December '25 – Preparation of Draft STIP
- January '26 – Draft STIP to OTC
- February '24 – March '25 – Public Comment period
- April '25 – May '25 – Final STIP prep
- June/July '25 – OTC approved Final STIP & federal submittal
- September '25 – 2027-2030 STIP Approved by FHWA/FTA





SIMS Staffing Updates

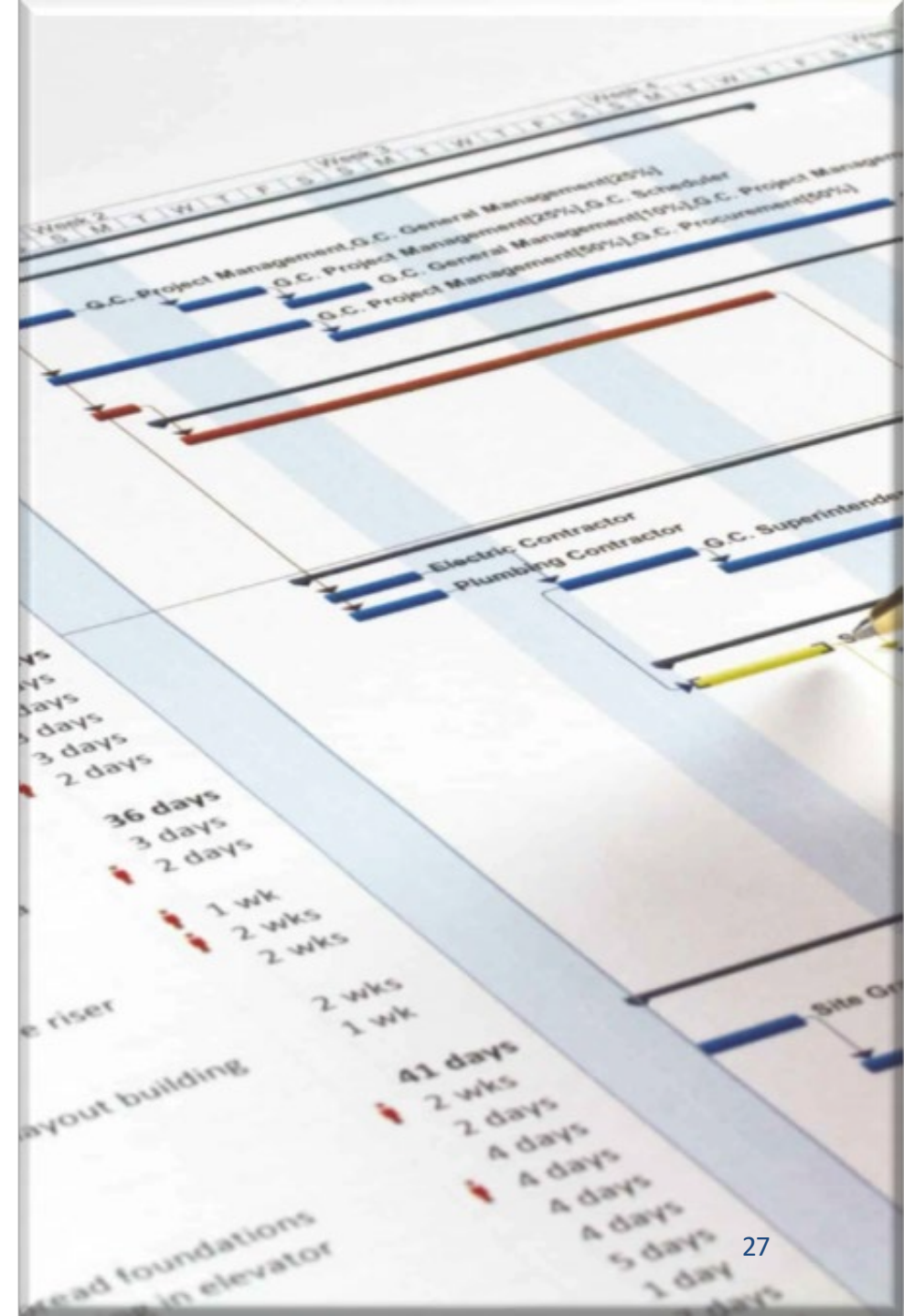
- Statewide Programs Unit
- Funding Obligation Unit
- STIP Unit



The background of the slide is a light blue surface covered with numerous small, light-colored wooden blocks. Each block has a dark grey question mark printed on its top face. The blocks are scattered across the entire page, creating a pattern of question marks.

Questions?

Critical Path Resource Update





Reminder: Annual Meeting PI&T Summary

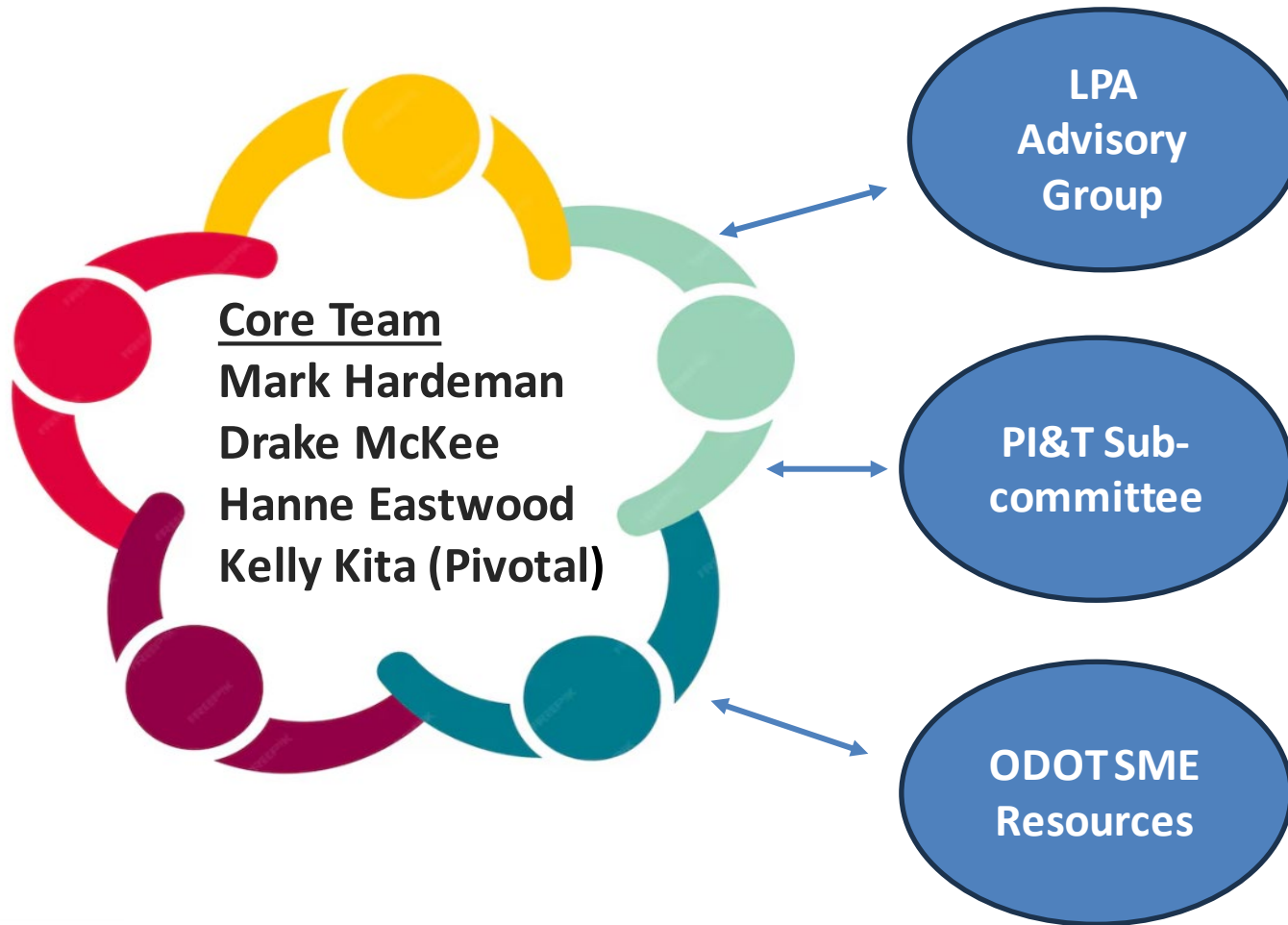
Takeaways from the November PI&T Subcommittee Workshop

1. Existing resources are good, *but . . .*
 - Need to understand where to find guidance and how to navigate the various manuals and resources.
2. There is a lot of existing human expertise, *but . . .*
 - Need to be able to identify who the experts are and facilitate connections.
3. There is a lot of information in the LAG and associated resources, *but . . .*
 - A more ***visual representation of critical paths and timeline***, showing interdependencies between areas would be beneficial.

KEY TAKEAWAYS



About the Team Structure



- Brian Banta, City of Salem
- Mark Foster, Marion County
- Paul Rudwick, City of Portland

- Quarterly Workshop in April
- ODOT and LPA input

- Right of Way, Utilities/Railroad, Environmental, Bridge, and others
- Web Editors



The Definition of “Critical Path”

The longest sequence of dependent activities that must be finished on time to complete the entire project

For our model, a deliverable or action that:

- Can slow down a project, affecting the ability to meet a deadline or committed date
- Is often a legal or Federal requirement
- Drives our ability to complete a project on time, in budget



IN Scope

OUT

Connecting to the LAG Manual content

Staying on top of what LAG or web changes affect CP in development

Identifying process improvements

Setting up for monitoring use of Critical Path

Editing the LAG Manual (another team)

Enhancing the format of the website

Bringing pieces together on the website for easier access

Recommending new templates to guide scheduling

Changing submittal requirements

Changing the processes

Presenting the Critical Path on the web

How Regions operate differently

Changing the website

Training people how to use the Critical Path

Listening to input before we finalize and doing a revision if needed

Content on how LPAs interact with ODOT on Federal projects

Content on project delivery processes within the LPAs



What Is Our Deliverable?

- **A documented model web-based, with links**
 - e.g., not a PDF that can get stale if people download it to their own systems
 - More visually compelling than a narrative document
- **Information on how to use it**
 - A short video explaining how to use it
 - An introductory webinar to launch it
 - A way for people to share best practices about it
- **Who is our audience?**
 - Primarily those new to federal-aid projects
 - Also of value to more experienced project managers as a tool during projects to access required forms, resources, and other materials



Progress to Date

- Developed a map of Critical Path items from Project Initiation through PS&E:
 - Project Initiation
 - 30% Plans
 - DAP (30-60% Plans)
 - 100% Plan
 - PS&E Submittal
- Provided the model to web editors to convert into an interactive web-based format.

Key Milestones



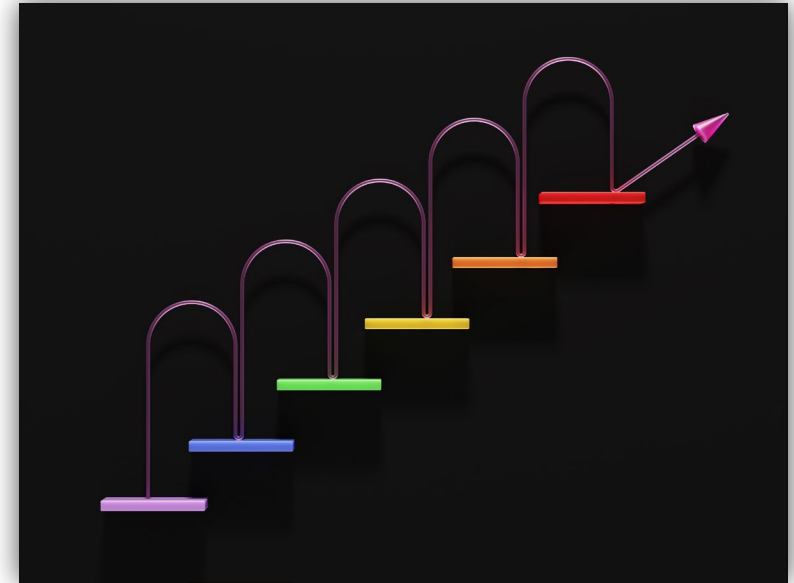
Key Takeaways

- Project Delivery can seem like something scattershot, with lots of activities going on, almost chaotic. The visual can really help us see and understand the path from start to finish.
- Lots of things can happen in project delivery that affect progress, but there is a linear flow – need to go with the flow!
- Getting started with Railroad and Utilities early in the process is important – deal with them early and often!
- Turnaround times for ODOT and FHWA reviews have to be built into the Critical Path if a project is to meet the major milestones.



Next Steps

- Continue working with web editors and develop the Critical Path from PS&E to Construction Contract Closeout.
- Share demonstration at next Process Improvement & Training Subcommittee meeting (Sept. 10 at 3pm).
- Schedule training/sharing opportunities for all CUG members in Fall 2024.





LAG Update Focus Groups Session 1

Topic 1:

Consultant Selection



Topic 2:

Utility & Railroad



Topic 3:

Right of Way





Lunch!

Informal Networking



LAG Update Focus Groups Session 2

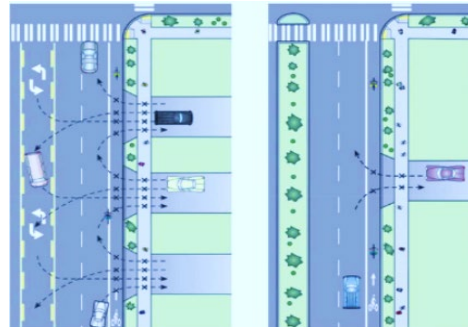
Topic 1:

NEPA & Environmental



Topic 2:

Access Management



Topic 3:

Bridge Certification





Roundtable:
Local Agency
Projects





Roundtable Participants

Discussion Leader:

Ryan Crowther, Capital Projects Manager, Marion County

Roundtable Contributors:

Olaf Sweetman, Project Manager, Lane County

Shane Ottosen Jr., Project Manager, Marion County

Mark Foster, Federal-Aid Coordinator, Marion County





Roundtable Topics

**Jurisdictional
Transfer**

**Utilities
Coordination
& Relocation**

**Value of Field
Visits**





Jurisdictional Transfer

- What considerations are essential for successful jurisdictional transfer?





Utilities Coordination & Relocation

- What to do when utility companies don't relocate on schedule?





Outstanding in Your Field

- What are the potential benefits of field visits?
- When should they be part of the schedule, and with whom?



Outstanding in Your Field

- Is it worth the trouble to look for and make changes?



Mill
Creek
Bridge



Hazelgreen
Bridge



Dates To Remember

- ★ **Process Improvement & Training Subcommittee**

September 10th 3:00 – 4:30 pm

- ★ **Standards Subcommittee**

September 16th 3:30 – 5:00 pm

- ★ **CUG Annual Meeting**

December 3rd





Closing Remarks - Thank you for coming!

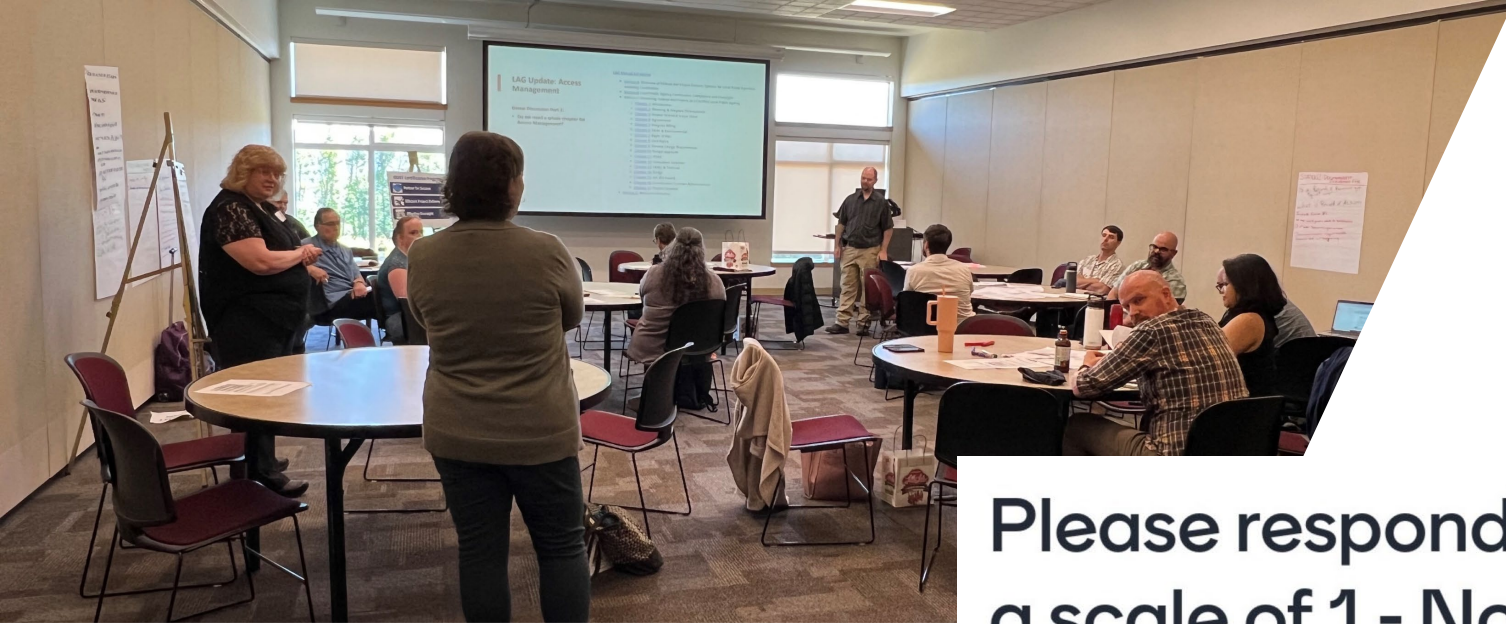


Summer Work Session Evaluation Results

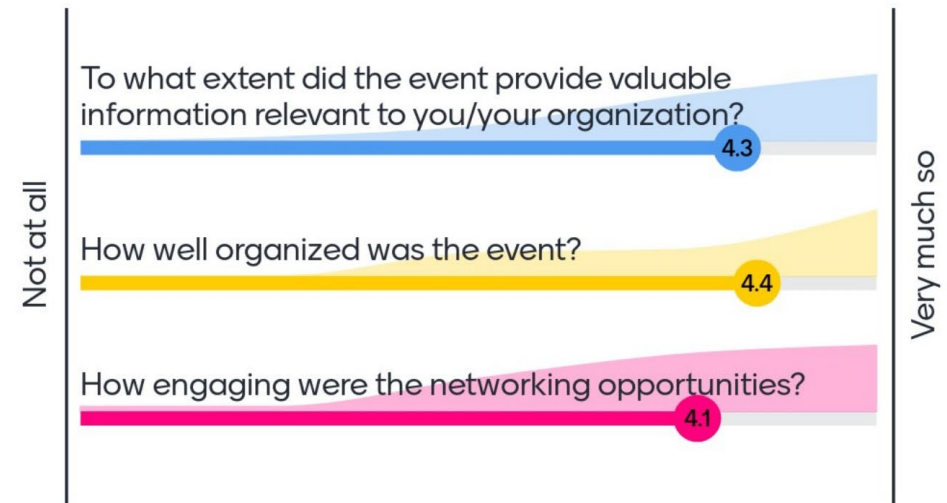


OBJECTIVE: Gather feedback from participants. A menti survey link was provided to all participants at the end of the meeting.

Results are on the following slides along with photos from the meeting.



Please respond to the following questions on a scale of 1 - Not at All to 5 - Very much so



What were the three most valuable sessions or activities for you today?



Informal networking



CUG Program Updates



Policy and Funding Updates



Concurrent Breakout Sessions



LPA Project Panel



Critical Path Resource Demonstration



What could we do better next time? (You can submit multiple responses)

Tiffany, your team always does an excellent job putting together meaningful workshops.

Best CUG summer meeting so far.

Not sure how helpful PMs are for some of the breakout sessions.

Nothing comes to mind

Better preparation for bridge design LAG meeting

I found this very informative, no other comments at this time.

If reviewing documents have more copies at the table

I thought this went really well!



What could we do better next time? (You can submit multiple responses)

First timer - I learned a lot. I met my goal for greater familiarity with LAG manual contents.

In person is good, but we would have had more attendance if hybrid was offered.

Nothing that I can think of

Prefer having a remote option
More healthy snacks

The Roundtable for Local Agencies was great and engaging! A/C was a bit cold and uncomfortable

LAG Manual updates - there is a big difference between word smithing and addressing issues with process, there should be more clarity on what the intent of the break out sessions

Hybrid option

Nothing I could identify



What could we do better next time?

Small group table discussions were not helpful, but large group question and discussions with subject matter experts answering were helpful.

Having more time for focus groups could be helpful!

