

# ATTACHMENT A PROPOSAL COVER SHEET

**RFP# 25134; Oregon Department of Transportation**

**This Proposal is for:** PE/Design Services , (OR) Both PE/Design and CA/CEI Services

**Legal Name of Firm as provided to IRS: Otak, Incorporated; an Oregon Corporation;**

**DBA Name (if different than legal name):**

<input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Professional Corporation <input type="checkbox"/> Ltd. Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Ltd. Liability Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other _____ Mailing Address <u>17355 SW Boones Ferry Road, Lake Oswego, Oregon 97035</u>
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Type name of primary Contact for this Proposal <u>Mike Peebles, PE</u> Email address <u>mike.peebles@otak.com</u> Telephone <u>503.635.3618</u> Fax <u>503.635.5395</u> Type name of person(s) authorized to sign Contract/Price Agreement: <u>Mike Peebles, PE</u>
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**“PASS/FAIL” - PROPOSAL SUBMISSION CHECKLIST (for Proposer use)**

- Submission Deadline Date and Time met
- Proposal Does Not Include Conditional Language about Terms and Conditions

**“REQUIRED” ITEMS –  
PROPOSAL SUBMISSION CHECKLIST (for Proposer use)**

- Proposal Cover Sheet Included and authorized original signature obtained
- Minimum Qualifications met and indicated on Proposal Cover Sheet
- Proposal Format and Page Length Requirements met
- Correct number of Proposals included along with CD for electronic submittals
- Reference Questionnaire forms
- Subcontractor/Supplier Solicitation and Utilization Form, completed and signed
- Checked off appropriate Conflict of Interest Disclosure certification on Proposal Coversheet (and included COI Disclosure Form(s) if there are required disclosures).

**RESPONSES TO MINIMUM QUALIFICATIONS (See RFP Section 1.5.2)**

➤ **Registered Professional Engineer**

Proposers must provide information below for at least one Registered Civil Engineer intending to perform civil engineering services under the Contract/Price Agreement.

Name	Registration Number	Jurisdiction of Registration
Ron Jee, PE	9670	Oregon
Sheryl Walsh, PE, LEED AP	70689	Oregon
Ian Fabik, PE	70849	Oregon

➤ **Registered Professional Land Surveyor (PLS)**

Proposers must provide information below for at least one PLS intending to perform surveying services under the Contract/Price Agreement.

Name	Registration Number	Jurisdiction of Registration
Jack Carlson	2044	Oregon
Gary Paul	2698	Oregon

**CERTIFICATIONS.** By signature below, the undersigned Authorized Representative on behalf of Proposer certifies that:

1. Agency shall not be liable for: a) any claims or be subject to any defenses asserted by Proposer based upon, resulting from, or related to, Proposer's failure to comprehend all requirements of the AE SOP Cover Sheet (Jan 2012)

RFP; or b) any expenses incurred by Proposer in either preparing and submitting its Proposal, or in participating in the proposal evaluation/selection or Contract/Price Agreement negotiation process, if any.

2. Neither the Proposer, a major partner or a major shareholder, (defined as a partner or shareholder owning 10% or more of your firm), a major subcontractor (defined as receiving 10% or more of the total Contract/Price Agreement amount), nor any principal officer of a Proposer, major partner, a major shareholder or major subcontractor:
  - a) is presently debarred, suspended, disqualified, proposed for debarment or declared ineligible for the award of contracts by any federal agency or agency of the State of Oregon, and is not listed on GSA's Excluded Parties List System which is available at <http://epls.gov>.
  - b) has, within the last 3-year period, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of federal or state antitrust statutes relating to the submission of bids or Proposals; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property? {A "principal officer of a Proposer, major partner or major subcontractor," means an officer, director, owner, or partner and any person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions)}.
3. Proposer has made all required **Conflict of Interest (COI) disclosures**, if any.  
The ODOT COI Guidelines and COI Disclosure Form are available at the following link: <http://www.oregon.gov/ODOT/CS/OPO/AE.shtml#Forms> (under "Misc. Procurement Related Forms")

**(Check one of the following two certifications as applicable)**

- Proposer understands and has provided to all Associates (which includes subcontractors) the COI Guidelines and COI Disclosure Form. Proposer and, to the best of the undersigned's information, knowledge and belief, Proposer's Associates (as defined in the COI Guidelines) are in conformance with the COI Guidelines, have no employees that were employed by ODOT within the last one-year period, and have no conflicts of interest or other disclosures required per the COI Guidelines. The response to each question on the COI Disclosure Form was "no".
- Proposer understands and has provided to all Associates (which includes subcontractors) the COI Guidelines and COI Disclosure Form. Proposer and, to the best of the undersigned's information, knowledge and belief, all Associates (as defined in the COI Guidelines) have provided on the COI Disclosure Form(s) submitted with this Proposal all disclosures required per the ODOT COI Guidelines.
4. Proposer has available (and can furnish to Agency upon request) the appropriate financial, material, equipment, facility and personnel resources and expertise, or ability to obtain the resources and expertise, necessary to indicate the capability of the Proposer to meet all contractual responsibilities.
  5. Proposer recognizes this is a public document open to public inspection. Any portion(s) of the Proposal that Proposer considers exempt from disclosure under Oregon Public Records Law is/are clearly designated in the Proposal and listed on a separate sheet attached to this Proposal Cover Sheet with justification and citation to the authority relied upon.
  6. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is:
    - o a minority, women or emerging small business enterprise certified under ORS 200.055, or
    - o a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225.

7. Proposer has an operating policy supporting equal employment opportunity. If proposing firm has 50 or more people, Proposer also has a formal equal opportunity program.
- o Does Proposing firm have 50 or more employees?  Yes,  No.
  - o Does Proposing firm have a formal equal employment opportunity program?  Yes,  No

Agency is an equal-employment-opportunity employer and values diversity in its work force. Agency requires its Contractors to have an operating policy as an equal employment opportunity employer. Firms of 50 people or less do not need to have a formal equal employment opportunity program, but shall have an operating policy supporting equal employment opportunity. Firms of 50 people or more shall also have a formal equal employment opportunity program.

8. The Proposal submitted is in response to the specific language contained in the RFP, and Proposer has made no assumptions based upon either (a) verbal or written statements not contained in the RFP, or (b) any previously-issued RFP, if any.
9. Proposer, acting through its authorized representative, has read and understands the RFP instructions, specifications, and terms and conditions contained within the RFP (including the sample contract) and all Addenda, if any. Failure to provide information required by the RFP may ultimately result in rejection of the Proposal.
10. Proposer agrees to and shall comply with, all requirements, specifications and terms and conditions contained within the RFP (including the sample contract) and all Addenda, if any.
11. Proposer and Proposer's employees and agents are not included on the list entitled "Specially Designated Nationals and Blocked Persons" maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at <http://www.treas.gov/offices/enforcement/ofac/sdn/t11sdn.pdf>.
12. All contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Cover Sheet, are truthful and accurate and have been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty. **False Claims.** Proposer understands that any statement or representation it makes, in response to this solicitation, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the Oregon False Claims Act, ORS 180.750(1)}, made under the resulting PA/WOC being a "false claim" {ORS 180.750(2)} subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
13. The signatory of this Proposal Cover Sheet is a duly authorized representative of the Proposer, has been authorized by Proposer to make all representations, attestations, and certifications contained in the Proposal document and to execute this Proposal document on behalf of Proposer.

**[Note: Any alterations or erasures to the proposal shall be initialed in ink by the undersigned authorized representative.]**



Date December 12, 2012

Authorized Signature

Mike Peebles, Principal

(Print Name and Title)

## PRELIMINARY ENGINEERING & DESIGN (PE-DESIGN)

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## INTRODUCTION

The full-service Otak team has the capabilities and capacity to provide Preliminary Engineering and Design (PE-Design) services for ODOT or Local Public Agency (LPA) transportation projects from inception to completion. We have extensive experience with project planning, scoping, alternative analysis, preliminary design, TS&L studies, final design through PS&E, and bid assistance on ODOT and LPA projects. Our full-service team was assembled to provide the following services with minimal oversight and involvement from ODOT or LPAs:

- Project scoping and prospectus development
- Project management/oversight
- Public involvement/ information
- Field survey and mapping
- Geotechnical investigation and design
- Environmental studies and documentation
- Hazardous Materials Assessment
- Hydraulic and scour studies and design
- Utility coordination and waterline/sewer design
- Roadway design
- Bridge assessments and design
- Storm water management and design
- Pavement design
- Traffic signal, signing, lighting, and access management design
- Railroad coordination
- Right-of-way acquisition
- Landscape architecture
- Acquire permits
- Cost estimates and specifications writing
- Construction bid assistance

Otak has gained a clear understanding of ODOT/LPA projects and processes as we have developed numerous projects for all five ODOT regions.

### ***Benefit to the Agency***

**Otak understands our client's needs and specifically structures project teams to deliver quality and cost effective projects**

One of our key strengths is the experience and understanding we have developed based on the following:

- Otak has worked on both current and previous ODOT Local Agency On-Call contracts for over ten years and has a clear understanding of the ODOT, LPA, and other stakeholders' needs to efficiently develop projects.
- Otak has worked on the ODOT Small Contracting Program, TGM Smart Growth Outreach, Land Use Focused Category 2 TGM, On-Call A&E and Related Services for Local Agencies, On-Call Stormwater Engineering and Environmental Services, Quick Response Program. We have a clear understanding of ODOT and federal requirements.
- Otak was the sole consultant on the ODOT Local Agency Scoping On-Call contract to develop scoping documents for consideration for funding and inclusion to the STIP from 2007-2011.
- Otak is one of two consultants selected to provide proprietary retaining wall reviews for ODOT Geo-Environmental Section and has a clear understanding of their requirements.
- Otak Project/Work Order Contract (WOC) Managers have participated in internal training of the LAG Manual and have a clear understanding of the requirements and processes, and have periodically taken ODOT project development training.

While Otak has teamed with quality, experienced subconsultants to form a full-service team, Otak's qualified, multidiscipline staff has the depth and capacity to self-perform a minimum of 51% of the PE-Design services for a typical project/WOC assignment. Our team has experience and presence throughout the state to support local projects in a cost effective manner.

Our team consists of experienced project/WOC managers and task leaders who will lead the project teams in completing tasks and delivering projects that are on schedule and within budget. Our project references for PE-Design services demonstrate our ability to assemble multidiscipline teams and successfully complete projects ODOT/LPA transportation projects.

## 2.2.1 PROPOSER'S PROJECT MANAGEMENT FOR PE-DESIGN

### A. Management and Organizational Structure

Otak's management & organization structure for the ODOT/LPA transportation projects is comprised of a Principal-in-Charge, Project/Work Order Contract (WOC) Managers, Contract Administrator/DBE Coordinator, and discipline-specific task leaders, technical staff, and administrative staff. This streamlined organizational structure will aid the services by providing:

- Single point-of-contact for WOC assignments and immediate response
- Outstanding customer service and responsiveness
- Appropriate levels of qualified managers/task leads, professional, technical, and administrative support staff
- Seamless transfer of project development information from design to construction phase

The Organization Chart on Page 3 identifies Otak's and subconsultant team members and their proposed role/discipline. The Project Team List on this page summarizes the full-service Otak team, including subcontractor office locations, services, and DBE/MWESB certification.

#### Principal in Charge (PIC)

As Principal-In-Charge (PIC) for this contract Mike Peebles will be responsible for the negotiation and execution of all Work Order Contracts. He will ensure that the ODOT/LPA projects have strong staffing continuity and the proper level of resources are available for each project. Mike oversees the project assignments of Otak's Transportation and Infrastructure teams for Oregon/SW Washington. He is supported by multiple Project Work Order Contract (WOC) Managers which will allow us to undertake multiple work order assignments concurrently. The identification of appropriate project team members and their assignment to the projects will be made in close consultation with ODOT and LPA staff. Mike will ensure that the most appropriate individuals are assigned based on the precise tasks to be accomplished, the background and experience of each individual, familiarity with the area and the project, their physical location, schedule, and workload capacity. As PIC, Mike's project involvement will be only as necessary to ensure the success of the project and client satisfaction.

#### Contract Administrator/DBE Coordinator

Tonya Finley will serve as Otak's Contract Administrator and DBE Coordinator. Tonya is a certified federal contract manager and has over 20 years of contract administration and small business coordination experience associated with federal and federally funded contracts. Tonya is a participant on the ODOT/ACEC A&E DBE Goal Setting Committee as well as the Small Business Administrator for Otak and has a thorough understanding of the requirements and goals associated with

Project Team List				
Key	Firm Name	Services	Oregon Offices	Cert.
AINW	Arch. Investigations NW	Cultural Resources	Portland	
AES	Anderson Eng. and Survey	Surveying/Mapping	Lakeview	
Casso	Casso Consulting	Utility/Specifications	Portland	DBE/MWESB
CC	Cornforth Consultants	Geotechnical Eng.	Portland	
DP	Dave Place	Constructability	Bend	
DKS	DKS & Associates	Transportation/Traffic	Portland	
ES&A	Env. Science & Assessment	Environmental	Portland	DBE/MWESB
EX	Exeltech	Structural	Portland	DBE
FEI	Foundation Engineering	Geotechnical Eng.	Corvallis	
FES	Ferguson Survey/Eng.	Surveying/Mapping	Mt.Vernon	
GD	GeoDesign	Geotechnical/HAZMAT	Portland	
GW	GreenWorks	Landscape Arch.	Portland	
HEA	Heberly Engineering	Roadway/Utility	Umpqua	MWESB
HRA	Heritage Research Ass.	Cultural Resources	Eugene	DBE/MWESB
JLA	Jeanne Lawson & Assoc.	Public Involvement	Portland	DBE/MWESB
KAI	Kittelson	Transportation/Traffic	Portland, Bend	
LDCA	Lois D. Cohen & Assoc.	Public Involvement	Portland	DBE
MB&G	Mason, Bruce & Girard	Environmental	Portland, Medford	
MMA	Michael Minor & Assoc.	Air/Noise	Portland	DBE
NN	Nevue Ngan Assoc.	Landscape Arch.	Portland	DBE/MWESB
Otak	Otak	Multidiscipline/Prime	Lake Oswego, Gearhart	
PHS	Pacific Habitat Services	Environmental	Wilsonville	
Reyes	Reyes Engineering	Signals/Illumination	Happy Valley	DBE/MWESB
ROW	Right-of-Way Assoc.	Right-of-Way	Beaverton	MWESB
S&W	Shannon & Wilson	Geotechnical/HAZMAT	Lake Oswego	
UFS	Universal Field Services	Right-of-Way	Salem	
WC	Wannamaker Consulting	NEPA/Environ.	Portland	MWESB
WG	Wallace Group	Geotechnical/HAZMAT	Bend	MWESB
West	West Consultants	Water Resources	Tigard/Salem	
WL	Westlake Consultants	Surveying/Mapping	Tigard	
Wiser	Wiser Rail	Rail Coordination	Tualatin	

ODOT's DBE Participation, Aspirational Targets, and Civil Rights program. Tonya will be involved with the overall PA and with each individual WOC assigned to Otak.

**ODOT/LPA CONSULTANT MANAGER**

**PE-Design Team Resources  
and Organization**

**PRINCIPAL-IN-CHARGE**  
Mike Peebles, PE Otak

**PROJECT / WOC MANAGERS**

+\*Ron Jee, PE Otak      +\*Gary Alfson, PE Otak      +\*Kevin Timmins, PE Otak      +\*Jack Carlson, PLS\* Otak  
 +\*Sheryl Walsh, PE, LEED Otak      \*Rich Darland, PE\* Otak      \*Tim Kraft, PE\* Otak      \*Ian Machan, PE\* Otak

**SENIOR REVIEW – QA/QC**

Bridge: +\*Ron Jee, PE Otak  
 Roadway: \*Rich Darland, PE Otak

**CONTRACT ADMINISTRATOR/  
DBE COORDINATOR**

Tonya Finley Otak

**PE-DESIGN SERVICES STAFF**

**ROADWAY DESIGN**

+\*Sheryl Walsh, PE, LEED Otak  
 +\*Gary Alfson, PE Otak  
 \*Rich Darland, PE Otak  
 Ian Fabik, PE Otak  
 Troy Kent, PE, LEED Otak  
 Kristen Ballou, PE Otak  
 Chad Maxwell, PE Otak  
 Keith Buisman, PE Otak  
 Brad Swearingen, PE, LEED Otak  
 Nico Vanderhurst, PE Otak  
 Lori McFarland, PE Otak  
 Touta Phengsavath, PE Otak  
 Windi Shapley, PE Otak  
 Grant Evenhus, PE Otak  
 Mark Castle, PE Otak  
 Collin Stelzig, PE Otak  
 Adam Heberly, PE HEA  
 Leroy Slemmer, PE EX

**SURVEYING & MAPPING**

+\*Jack Carlson, PLS Otak  
 Dale Barrett, PLS Otak  
 Jerry Osgood, PLS Otak  
 Gary Paul, PLS Otak  
 David Breneman, PLS Otak  
 Rob Graham, FLS Otak  
 Gary Anderson, PLS WL  
 Kenneth Delano Jr, PLS FES  
 Mitchell Ferguson, LSI FES  
 Darryl Anderson, PE, PLS AES  
 Ryan Conn AES

**UTILITY COORDINATION**

\*Gary Alfson, PE Otak  
 Ian Fabik, PE Otak  
 Ae-young Lee, PE Otak  
 Chad Maxwell, PE Otak  
 Tina Adams, PE Casso

**STRUCTURAL/BRIDGE  
DESIGN**

+\*Doug Sarkkinen, PE, SE Otak  
 +\*Ron Jee, PE Otak  
 Kelly Freeman, PE, SE Otak  
 Steve Wilson, PE Otak  
 Ae-young Lee, PE Otak  
 Xiao Wu, EI Otak  
 Greg Mines, PE Otak  
 Karl Kirker, PE, SE EX  
 Ernest Nelson, PE, SE EX

**WATER RESOURCES**

+\*Kevin Timmins, PE Otak  
 \*Gary Wolff, PE, CWRE Otak  
 \*Tim Kraft, PE Otak  
 Bob Schottman, PhD, PE Otak  
 Ryan Billen, PE Otak  
 Ashley Cantlon, PE, LEED Otak  
 Quinn Donnelly, PE, LEED Otak  
 Greg Laird, PE Otak  
 Jeremy Andrews, PE Otak  
 Chris Bahner, PE West  
 Hans Hadley, PE, CFM West

**TRANSPORTATION  
PLANNING**

\*Wade Scarbrough, PE KAI  
 \*Brian Copeland, PE, PTOE DKS  
 \*Tom Litster Otak  
 Mandi Roberts, AICP Otak  
 Jason Lien, AICP Otak

**SIGNALS/ILLUMINATION**

Jim Peters, PE DKS  
 Flaviano Reyes, PE Reyes

**TRAFFIC ENGINEERING**

\*Brian Copeland, PE, PTOE DKS  
 Jim Peters, PE DKS  
 \*Wade Scarbrough, PE KAI  
 Charles Radosta, PE KAI  
 Hermanus Steyn, PE KAI  
 Adam Heberly, PE HEA  
 Ian Fabik, PE Otak  
 Chad Maxwell, PE Otak

**GEOTECHNICAL  
ENGINEERING**

+George Machan, PE CC  
 Larry Pierson, RG, CEG CC  
 Park Piao, PE, GE S&W  
 Derrick Hayes, PE S&W  
 Allison Pynch, PE, GE S&W  
 Bill Nickels, PE, GE FEI  
 Tim Pfeiffer, PE FEI  
 George Saunders, PE, GE GD  
 Krey Younger, PE, GE GD  
 Mark Herbert, PE, GE WG  
 Scott Wallace, RG, CWRE WG

**HAZARDOUS MATERIALS**

\*Kim Elliott, CEG S&W  
 David King, RG, LHG S&W  
 Craig Ware, RG GD  
 Jason O'Donnell, RG GD  
 Mark Herbert, PE, GE WG  
 Scott Wallace, RG, CWRE WG

**NEPA/ENVIRONMENTAL**

Lynda Wannamaker WC  
 Mandy Flett Otak  
 Jason Lien, AICP Otak

**ENVIRONMENTAL  
DOCUMENTATION/  
PERMITTING**

+\*Stuart Myers MB&G  
 Justin Moffett MB&G  
 \*Jean Ochsner ES&A  
 Patrick Hendrix ES&A  
 John Van Staveren PHS  
 Eric Campbell PHS  
 Kevin O'Brien Otak

**LANDSCAPE ARCHITECTURE/  
STREETSCAPE**

\*David Haynes, RLA, LEED Otak  
 \*Tom Litster Otak  
 Kaitlin North, RLA Otak  
 Maggie Daly Otak  
 Mandi Roberts, LA, AICP Otak  
 Curtis LaPierre, LA, AICP Otak  
 Ben Ngan, RLA NN  
 David Goodyke, RLA NN  
 Mike Faha, RLA GW  
 Tim Strand, RLA GW

**CULTURAL RESOURCES**

\*Jo Reese, MA, PRA AINW  
 Judith Chapman, MA AINW  
 Kathryn Toepel, PhD HRA  
 Robert R. Musil HRA  
  
**RIGHT-OF-WAY**  
 +\*Leslie Finnigan UFS  
 Regina Thompson UFS  
 \*David Feinauer ROWA

**PUBLIC INVOLVEMENT**

+\*Stacy Thomas JLA  
 Jeanne Lawson JLA  
 Lois Cohen LDCA  
 Jason Lien, AICP Otak  
 Mandy Flett Otak

**LAND USE PERMITTING**

Jason Lien, AICP Otak  
 Jerry Offer Otak  
 Mandy Flett Otak

**AIR/NOISE**

Michael Minor MMA  
 Roger Whitaker MMA

**RAIL COORDINATION**

Tom Wiser, PE Wiser  
 +\*Sheryl Walsh, PE, LEED Otak  
 \*Rich Darland, PE Otak

**CONSTRUCTABILITY  
REVIEW**

\*Ian Machan, PE Otak  
 +\*Ron Jee, PE Otak  
 Dave Place DP

**SPECIFICATIONS**

\*Ian Machan, PE Otak  
 Ian Fabik, PE Otak  
 Tina Adams Casso

+Key Staff Resume in Appendix A  
 \*Qualifications Summary table, pages 9-10

## Work Order Contract (WOC) Managers

The individual project/WOC managers shown in the org chart have been selected based on their expertise and experience leading multi-discipline teams on ODOT and/or Local Public Agency projects. Our team of project/WOC managers has depth and breadth of experience to handle any project issued under this Full Service A&E Price Agreement. The project/WOC manager is empowered to lead the project from the outset by scoping the project with the client, leading the WOC negotiations, and selecting team members based on expertise and familiarity with the project type, location, and client. Senior technical staff are assigned to the project for the duration and are responsible for delivering specific project elements. This holds true for both internal Otak staff and subconsultants.

## How Subcontractors will be Selected, Utilized, and Managed to Complete the Projects

Otak's strong relationship with a wide variety of subcontractors allows us to provide expert services across a broad geographic and technical spectrum. We have included multiple subcontractors for each discipline to provide additional depth and flexibility to address any assignment, meet the MWESB aspirational targets, and achieve the DBE participation goals. Otak will utilize DBE/MWESB certified firms where their involvement provides benefit to the project. The PIC and project/WOC manager will select the most qualified and experienced subcontractors based on:

- Expertise required
- Experience and qualifications with similar projects, ODOT, stakeholders, and similar locations
- Current project workload and availability
- DBE/MWESB status
- Cost effectiveness
- Office location(s)

Subcontractors are completely integrated into the project team, including weekly team meetings, schedule responsibilities, managed deliverables and quality control reviews. Subcontractors are held to the same level of accountability as internal disciplines allowing project development to proceed smoothly and efficiently. Team work sessions integrate all disciplines, including subcontracted disciplines, and proactively address issues and develop solutions. When necessary, subcontractors also attend project meetings with the team, client, and stakeholders.

### **Benefit to the Agency:**

Otak's experience and working relationship with subcontractors provides unparalleled depth and breadth of experience for ODOT and Local Public Agency Projects

## B. Coordinating and Expediting the Project Elements to Meet Delivery Schedules

Otak utilizes a proactive approach in coordinating and expediting project elements to meet delivery schedules. Using an integrated project schedule, we evaluate each project task for ways of reducing delivery time including flow-down review of supportive tasks. Otak accomplishes this by implementing the following strategies during project development:

### Establish Partnering

Otak believes each stakeholder of a project possesses an important voice to be considered during project development. We know that strong working relationships built on cooperation, ethics, expertise, and experience are essential for a successful project. Our team routinely works with the owner, contract agency, utility companies, regulatory agencies, affected property owners, interested citizens and community groups, tribal organizations, and construction contractors associated with the project.

### Define Project Goals and Objectives

Otak will work closely with the Local Public Agency and ODOT in defining the project goals and objectives. We identify the design standards and criteria in attaining the goals and objectives, keeping the team focused on efficiently designing and developing the project. Our project manager and task managers review and distribute the project criteria with the team members at the design team kick-off meeting, incorporate the criteria in the Design Acceptance/TS&L Report, and reference the criteria during the quality control reviews/design checks.

### Clarify Statement of Work and Project Responsibilities

Otak's leadership ensures that all team members have a clear understanding of the Project's Statement of Work (SOW) and develops an appreciation for the assigned project's role in ODOT's obligations to the Oregon Transportation Commission, the State Legislature and the traveling public. With this knowledge, we focus our efforts to collaborate with ODOT/LPAs and maintain our flexibility and creativity to the key challenges in meeting delivery schedules, such as:

- Environmental Issues and Permitting Requirements
- Stakeholder concerns
- Right-of-way Acquisition(s) and Certification(s)
- Fulfilling the requirements of the funding sources
- Challenge team members to assess task/project direction in more efficient ways
- Regularly schedule working sessions with ODOT/LPAs and key stakeholders to keep all project delivery team members well informed and focused on project
- Maintain project documentation for efficient sharing of data, and project documentation

## Early Identification of Right-of-Way Needs

Right-of-way (ROW) issues must be identified early in the process and solved in an expeditious fashion. Identifying the project's ROW needs early will keep the project on schedule and avoid delays. It will also allow the necessary time to negotiate a fair market price. Certain individual steps of right-of-way acquisition may be condensed depending on specific project needs and circumstances. However, statutory requirements (ORS 35) must be met to ensure a complete and justifiable process.

## Adjustment of Schedules to Meet Delivery Schedules

We are experienced with the ODOT project development process and in assessing how projects can be impacted with schedule changes. If schedules are impacted, Otak is experienced in developing a full range of schedule recovery options. We monitor, anticipate, and maintain schedules to avoid project delays based on an established clear, well-written statement of work (SOW).

Our team managers are experienced in the use of project scheduling software (MS Project) to develop and maintain timelines and critical path items. Using these graphical tools allows immediate and visual determination of potential deviations in the project schedules. This allows for early notification to key stakeholders and timely collaborative discussion of acceptable responses. As shown in the table below, we have numerous successes at adjusting intermediate task schedules to provide the desired overall schedule such as:

- starting preliminary designs utilizing technical memos from site investigations/studies instead of waiting for the supportive technical reports;
- accelerating right-of-way clearance by diligently addressing property owner issues;
- accelerating environmental clearances by providing thorough environmental documentation and early discussions with regulatory agencies; and
- quickly resolving complex issues with work sessions involving owner and other appropriate stakeholders.

SAMPLE OTAK FAST-TRACK PS&E DELIVERY		
PROJECT NAME	COST	DURATION
Main Street - Harwood Street; Prineville, OR	\$1.6M	10 wks
9th Street - Deer Street; Prineville, OR	\$1.5M	15 wks
Tumalo Creek (Shevlin Park); Bend, OR	\$0.12M	2 wks
Fawcett Creek Bridge; Tillamook County, OR	\$1.0M	8 mos
US395: N Fork John Day River Bridge; Umatilla Co.	\$4.1M	12 wks
US395: Camas Creek Bridge; Umatilla County, OR	\$3.8M	12 wks
OR19: John Day River Bridge; Grant County, OR	\$3.6M	12 wks
1st Street & Main Avenue Sidewalks & Bike Lanes; Irrigon, OR	\$1.3M	3 wks

## Benefit to the Agency:

Otak brings the experience of having developed over 40 fast-track projects in the last five years for ODOT and/or LPAs

Our experience has taught us that close communication and collaboration with ODOT/LPAs and the stakeholders is required to define how project schedules and staffing needs are adjusted and to what extent. Our team utilizes the following philosophy and strategies in managing adjustment of schedules:

- Determine the initial cause for the project adjustment
- Determine the impact of the adjustment with each design task and construction schedule
- Identify options and methods to respond to the adjustment
- Examine the project schedule to identify scheduled tasks that can be accelerated
- Establish a revised schedule for review and approval by LPA, ODOT and stakeholders
- Ensure clear communication of the revised schedule to all team members
- Monitor and mitigate the effects of the revised schedule

## Adjustment of Staffing/Level of Effort to Meet Delivery Schedule

Otak is known for innovation and has deep company resources to focus on any project situation. With approximately 120 Otak technical staff and hundreds of additional staff through our team subconsultants, and with a wide range of technical disciplines, we are dedicated to keeping our ODOT and LPA commitments and will devote appropriate resources needed to keep the assigned project on schedule. We match up the staff availability, required expertise, and cost-effectiveness with the assignment and budget. Weekly staffing meetings identify projects needing additional personnel and over-staffed projects in a continual process to properly manage available staff and capability. Balancing of staff is performed each week. In addition, our staff is available to work extra time to meet project commitments.

## C. Quality Control Procedures and Policies for PE-Design

Otak is focused on our role and responsibilities in delivering the highest quality engineering services. As shown in the "PE-Design Quality Control Procedures" table on the following page, our internal QA/QC procedures and policies are a concise systematic means to help each staff fulfill their responsibilities to our clients. These procedures and policies are understood and accepted by each team member from principal-in-charge to project assistant, for Otak and its subconsultants. In addition to Otak's commitment to quality, each person takes personal responsibility for what they do and how they do it.

PE Design: QUALITY CONTROL PROCEDURES	
QC Issues	Highlights
<b>Client Orientation Meeting</b>	<ul style="list-style-type: none"> <li>• Within one week of NTP, Work Order Contract Manager (WOCM) &amp; Key Team Members (KTMs) meet</li> <li>• Review project requirements for assumptions, roles, tasks, schedule, budget, project issues, and client expectations</li> </ul>
<b>Design Team Orientation Meeting</b>	<ul style="list-style-type: none"> <li>• Within 5 days of Client Orientation Meeting, WOCM &amp; Design Team reviews project requirements</li> <li>• Identify KTMs and staff to form Project Development Subteam (PDS)</li> <li>• PDS performs design, drafting, and QC technical checks</li> </ul>
<b>Deliverable Ready Review</b>	<ul style="list-style-type: none"> <li>• QC Review per deliverable schedule</li> <li>• WOCM monitors QC document status</li> <li>• WOCM submits Ready QC Document to QC Senior Review Team (QC SRT)</li> </ul>
<b>QC Review Meeting</b>	<ul style="list-style-type: none"> <li>• QC SRT meets with WOCM and KTMs to review QC comments</li> </ul>
<b>Review Comments Disposition</b>	<ul style="list-style-type: none"> <li>• PDS resolves QC comments</li> <li>• PDS makes the appropriate changes</li> <li>• Updated Review Ready document and Comment Log resubmitted to QC SRT for back-checking</li> </ul>
<b>Assembly of Total Submittal Package</b>	<ul style="list-style-type: none"> <li>• QC SRT accepts the document for submittal to client</li> <li>• Project Assistant assembles the submittal package</li> </ul>
<b>QC Submittal Package</b>	<ul style="list-style-type: none"> <li>• WOCM or delegated representative performs QC of the package prior to submittal to client</li> </ul>
<b>Client Review</b>	<ul style="list-style-type: none"> <li>• Client review comments are returned to WOCM</li> <li>• Client input received as to submittal acceptance or resubmittal</li> </ul>
<b>WOCM/KTMs Meeting</b>	<ul style="list-style-type: none"> <li>• WOCM shares client comments with KTMs, as well as schedule for corrections</li> <li>• WOCM informs KTMs if submittal accepted or resubmittal necessary</li> </ul>
<b>Disposition of Client Comments</b>	<ul style="list-style-type: none"> <li>• KTMs resolve client comments with PDS</li> <li>• Follow-up action for document corrections and disposition of comments are discussed</li> </ul>
<b>Resubmittal</b>	<ul style="list-style-type: none"> <li>• Changes to documents cycle through project development and QC process again until acceptable for resubmittal to client</li> </ul>

The Otak team builds quality into each phase of a project, from contract development, design, construction, to closeout. Otak's generic QA/QC Plan is on file with ODOT and is tailored to meet the requirements of each specific client and project. The general process applies to any of our team's work, such as reports, calculations, plans, specifications, and estimates.

#### D. Determination of Sufficient Total Construction Budget

Construction budget monitoring is a key to keeping a project moving forward in meeting its goal and objectives. Otak will monitor the sufficiency of the total construction budget at milestones throughout the project which have been identified with the client. Our cost estimates will include construction items, construction contingencies, right-of-way, and preliminary (PE) and construction (CE) engineering, and will be based on historic cost data from ODOT, local agencies, and the applicable industry. The following project milestones are ones which Otak has estimated total construction costs and compared it to the project budget based on the client's planning level estimate, prospectus or funding application:

- Project Scoping (before design starts) would normally consist of a site visit with the ODOT/LPA, and key consultant staff meeting at the site, discussing the project goals, objectives and especially unusual project issues, and then performing a planning level cost estimate.
- Concept/Alternative Analysis (15%) would involve reviewing project site data and design criteria, performing minimal engineering calculations to identify feasible alternatives, and assessing the alternatives including costs estimates.
- Preliminary Design (30%) would include estimating costs based on the preliminary design of the preferred alternative selected by the client. This estimate would be more comprehensive than the 15% estimate being based on a more detailed design. Costs of construction items could be based on calculated quantities, square foot costs, and/or costs of similar projects.
- Advance Design (60 and/or 95%) would include a detailed cost estimate based on these detailed design phases. Allowance for contingencies and CE may be reduced from a typical 40% depending on the size of the project.
- PS&E (100%) would include the Engineers Estimate that would be used to justify the acceptance of the construction bid. For this level of estimate, the contingencies can typically be reduced to 3.5% of the cost of the construction items, and CE costs will be based on the established CE budget.
- During construction the monitoring of bid item overruns/ underruns and impacts to the total construction budget would be performed.

If the construction budget appears insufficient, Otak will immediately discuss the apparent shortfall with the client and explain the basis of the cost estimate including assumptions, areas of potential adjustments in quantities/design, and risks to the project. As the project progresses, our team will review opportunities for cost saving measures and discuss these with the client for inclusion in the project design.

## 2.2.2 PROPOSER'S COST EFFECTIVENESS FOR PE-DESIGN

### A. Ensuring Cost-effective Tasks and Deliverables

Otak's client focus drives us to continually monitor our processes and activities to maintain cost effectiveness and efficiency. We have found that one of the best ways to complete projects in a cost effective manner is to start the project on the right track and maintain an accurate course with the steps listed below:

- Begin every project with a 'kick-off' meeting with all discipline leaders in attendance.
- Task Leads actively monitor staff efficiency and task completion on a weekly basis.
- Project/WOC managers meet regularly with task leads to discuss progress, challenges, and corrective actions.
- Implement alternative analysis and value engineering principles in developing project designs, and provide cost-effective solutions.
- Engage construction staff in 'constructability reviews' early in the design process to avoid rework later.

Accurate tracking of the project costs is accomplished with the following steps:

- Projects are broken down into distinct, measurable tasks with each task assigned deliverables and a corresponding budget.
- Project/WOC managers receive weekly reporting on project charges by task providing instant feedback on project expenditures.
- Weekly project meetings allow project/WOC managers to review expenditure trends with the team and confirm requisite progress.
- The PIC holds monthly meetings with each project/WOC manager to review budget, schedule, progress and anticipated issues.

### Ensuring All Travel, Lodging, and Per Diem Expenses are as Low as Possible

Otak continually addresses the requirements and costs of project travel to minimize the impact on project budgets. We utilize the standard mileage and per diem rates listed in the Federal Travel Resource and always strive to maintain expenses below the contract requirements.

Our team is committed to providing ODOT and local agencies efficient and cost-effective service through the following measures:

- Plan trips to provide as many services as possible to reduce the overall number of trips to the project site
- Quick assessment of cost effectiveness for different travel modes (air, rental car, personal vehicle)
- Obtain the closest, economical accommodations to the work site by comparing at least three different providers
- Obtain corporate discounts for travel and lodging
- Use video, audio and web-based conferences to minimize travel
- Flexible schedules to work longer days during travel to reduce the length of stay; overtime charges do not pass to client
- Review availability of rental accommodation for longer terms
- Utilize staff throughout the collective office locations of the Otak team that are most appropriate for the work effort required
- Efficient use of local subconsultants to reduce team travel
- All travel expenses are verified using original receipts and completed expense account forms

### B. Development of Cost Estimates for Services

Developing a fair and reasonable estimate for services hinges on a clear understanding of the underlying Statement of Work (SOW). Otak actively engages the client in a discovery process to clearly identify the key driving issues associated with each project. Key elements that are discussed in initial client meetings include the following:

- Budget constraints
- Challenging site issues
- Environmental Permit timeline
- Proposed stakeholder involvement
- Anticipated project schedule and milestones
- Level of client involvement and review
- Initial project assumptions

The project Statement of Work serves as the backbone for developing the project budget and schedule. Each work element and deliverable is assigned a duration and interdependencies are established setting the start/finish dates. Project design and construction milestones (deliverables), review periods, and key project and Agency team meetings are established (including public involvement meetings). The resulting schedule is compared with the desired project

development timeline and adjustments are made as necessary. Client review and conditional approval of the target schedule sets development of the estimate for services. Utilizing the SOW and schedule, the estimate for services is developed and checked using at least three of the following methods:

- **Detail Cost Breakdown** - Developed by breaking assigned staff classifications, hours and rates to each task identified in the SOW.
- **Schedule** – Developed by estimating the overall level of effort associated with the project duration indicated by the schedule.
- **Cost Per Deliverable** – Estimated using historic cost per meeting/drawing/submittal/etc.
- **Percentage of Total Project Cost** – Based on historic, reasonable percentages of the overall project construction cost
- **Historic Costs** of similar projects and SOW

### Ensuring that Estimates are Fair and Reasonable to ODOT, Local Agency and Firm

The resulting estimate is reviewed by the PIC as well as other project management peers to ensure that key issues are not overlooked. Constant communication with the ODOT or the Local Agency Project

Manager tests the developing range of the estimate against client expectations. In the event that the scope and expected estimate are not in agreement, Otak works with the client to revise the scope, deliverables, or schedule to bring the two into agreement. We also assemble our project teams in a budget-conscious manner and offer a variety of staff experience with a rate table that correlates to their experience level. This allows us to maintain reasonable costs for project tasks by assigning the most cost-effective staff to the project based on required expertise and experience.

Otak actively maintains a database of past and current projects to compare fee estimates for similar projects. The use of contingency tasks for elements that may be in dispute or unknown allows the client the flexibility to approve the contract while still evaluating the relevancy of certain project elements.

Open, honest, and timely communication with the client, coupled with a clear understanding of the level of effort and staffing required to complete the scope of work, is the key to developing a fair and reasonable estimate for services that is tailored to the unique needs of the project.

## 2.2.3 PROJECT TEAM & QUALIFICATIONS FOR PE-DESIGN SERVICES

### A. Project Managers' Experience

Otak has a group of highly experienced and skilled project/WOC managers, as shown in the Organization Chart on page 3 and listed in the Key Staff table on pages 9-10, with extensive project management credentials directing and guiding interdisciplinary teams. The two project managers featured in the Key Staff Resume section are Ron Jee and Sheryl Walsh.

**Ron Jee** has over 20 years of experience managing work order contracts, complex transportation projects, and interdisciplinary teams in Oregon. His project management experience ranges from small building structural assessments/design to large Interstate Freeway projects. Ron has successfully managed project teams consisting of Otak, subconsultants, and Agency staff by using a partnering approach for over 150 transportation projects in Oregon. Typically his project leadership role includes both PE and CE phases of projects, from project scoping/work order development, through the design phase, and to completion of construction.

**Sheryl Walsh** has been working on civil engineering projects since 1997, specializing in highway, arterial, collector street, and bike/pedestrian facility projects for State and Local Public Agencies. Her experience includes new construction, realignments, and retro-fit projects. She is skilled and experienced in managing multi-discipline projects, including federally-funded transportation projects.

Each project/WOC manager has demonstrated the ability to identify and understand the unique challenges that various types of projects present, and have successfully orchestrated multi-faceted teams to deliver their projects. Their projects have ranged from a small cost study to complex high profile projects. Each has at least 10 years of transportation experience, and several with over 20 and even 30 years of experience, earning them detailed insight on client requirements, procedures and key issues, and how to work closely with clients and stakeholders. All of our project/WOC managers have State and Federally-funded project experience with ODOT and LPAs.

For the last 12 years, this project experience has been gained through Otak's Statewide ODOT A-E On-Call Contracts, ODOT/Local Agency A-E On-Call Contracts, and other agency project contracts.

KEY STAFF	EXPERTISE & BENEFITS TO THE OTAK TEAM <span style="float: right;">+ Key Staff Resume in Appendix A</span>
<b>Project/WOC Managers</b>	
<b>+RON JEE, PE</b> <i>Otak</i> Bridges & Structures	<ul style="list-style-type: none"> <li>• 30+ years of experience includes 22 years with ODOT Bridge and Construction group</li> <li>• 20+ years managing work order contracts, complex transportation projects, and interdisciplinary teams in Oregon. Engineer for 60+ bridges; Project manager for 150+ transportation projects.</li> </ul>
<b>+SHERYL WALSH, PE, LEED AP</b> <i>Otak</i> Roadway & Pedestrian Improvements	<ul style="list-style-type: none"> <li>• 15 years of experience managing and designing road, utility, and drainage projects and acting as a liaison with stakeholders and the general public.</li> <li>• Experience includes management of federally funded new construction, realignment, and retrofit multi-modal transportation projects</li> </ul>
<b>+GARY ALFSON, PE</b> <i>Otak</i> Roadway	<ul style="list-style-type: none"> <li>• 31 years of experience as roadway design engineer and project manager</li> <li>• Knowledge of AASHTO Standards related to pedestrians, bicycles and vehicles, and drainage treatment, detention and conveyance requirements.</li> </ul>
<b>RICH DARLAND, PE</b> <i>Otak</i> Roadway & Pedestrian Improvements	<ul style="list-style-type: none"> <li>• Specializes in roadway, drainage, and infrastructure planning, design, and management</li> <li>• Provides overall quality management, including technical reviews, subconsultant deliverables, and specifications.</li> </ul>
<b>+KEVIN TIMMINS, PE</b> <i>Otak</i> Hydraulics & Stormwater Management	<ul style="list-style-type: none"> <li>• 13 years of water resources engineering experience</li> <li>• Expertise includes hydrologic/hydraulic modeling, fish passage culverts, scour analysis, flood reduction, stream/wetland restoration, stormwater management</li> <li>• Knowledgeable with regulatory permit requirements</li> </ul>
<b>TIM KRAFT, PE</b> <i>Otak</i> Water Resources	<ul style="list-style-type: none"> <li>• Masters degree in Environmental and Water Resource Engineering with 17 years professional engineering experience</li> <li>• Expertise in project management, stormwater modeling and design, watershed analysis, water quality analysis, bridge hydraulics</li> </ul>
<b>+JACK CARLSON, PLS</b> <i>Otak</i> Survey & Mapping	<ul style="list-style-type: none"> <li>• 30 years of survey experience on highway/roadway projects, providing R/W and centerline recovery surveys, preliminary R/W drawing prep, and topographic surveying and mapping.</li> <li>• Proven ability to facilitate economies of effort, schedule, and budget</li> </ul>
<b>IAN MACHAN, PE</b> <i>Otak</i> Constructability Review & Specifications	<ul style="list-style-type: none"> <li>• 10 years of project management experience for ODOT and FHWA projects</li> <li>• Has worked on over 30 ODOT projects with experience in PS&amp;E deliverables</li> <li>• Provides constructability reviews during design development phase for complex transportation projects</li> </ul>
<b>Key Discipline Leads</b>	
<b>+ DOUG SARKKINEN, PE, SE</b> <i>Otak</i> Structural Engineering	<ul style="list-style-type: none"> <li>• Sr. project manager/bridge engineer with 25 years of structural and bridge engineering experience.</li> <li>• Has presented 18 structural papers/presentations at technical conferences including ODOT Bridge Design, ACI, ASCE, and PTI.</li> </ul>
<b>C. GARY WOLFF, PE, D.WRE</b> <i>Otak</i> Hydraulics	<ul style="list-style-type: none"> <li>• Expert in HEC-RAS modeling with 30 years experience</li> <li>• Specializing in surface water hydrology, open-channel hydraulics, scour analysis; mitigation, and river mechanics</li> </ul>
<b>TOM LITSTER</b> <i>Otak</i> Transportation Planning & Streetscape Design	<ul style="list-style-type: none"> <li>• Strong portfolio of Smart Growth land use and transportation planning projects.</li> <li>• Expertise includes public streetscapes; transit feasibility studies, station design and station area planning.</li> </ul>
<b>DAVID HAYNES, PLA, LEED GA</b> <i>Otak</i> Landscape Architecture	<ul style="list-style-type: none"> <li>• 25 of years of landscape architecture experience including public streetscapes; multi-use paths; and urban design projects.</li> <li>• Works closely with environmental and stormwater team to determine appropriate planting plans for state and LPA transportation projects.</li> </ul>
<b>WADE SCARBROUGH, PE</b> <i>KAI</i> Transportation Planning & Engineering	<ul style="list-style-type: none"> <li>• 17 years of experience working on a variety of transportation projects involving traffic operations analysis, conceptual design studies, preliminary roadway design, and final traffic design.</li> <li>• Prepares preliminary and final plans, special provisions, and cost estimates for roadway improvement projects including roundabouts, signals, signing, striping, and illumination.</li> </ul>

KEY STAFF	EXPERTISE & BENEFITS TO THE OTAK TEAM
<b>Key Discipline Leads</b> <i>(continued)</i> <span style="float: right;">+ Key Staff Resume in Appendix A</span>	
<b>BRIAN COPELAND, PE, PTOE</b> <i>DKS</i> Transportation Planning & Engineering	<ul style="list-style-type: none"> <li>• 20 years of designing traffic engineering improvements for ODOT and dozens of other public agencies</li> <li>• Full understanding of traffic operations elements, intersection/roadway capacity analysis, lighting analysis, safety studies, development of traffic management plans, and construction services</li> </ul>
<b>+GEORGE MACHAN, PE</b> <i>Cornforth</i> Geotechnical Engineering	<ul style="list-style-type: none"> <li>• 30+ years of experience including 12 years at ODOT as the statewide Geotechnical Engineer and Project Manager</li> <li>• Has provided geotechnical direction on over 100 ODOT projects</li> </ul>
<b>KIM ELLIOTT, CEG</b> <i>S&amp;W</i> Hazardous Materials	<ul style="list-style-type: none"> <li>• Professional Geologist and Certified Engineering Geologist, with 30 years of engineering and environmental geology experience</li> <li>• Exceptional knowledge of local soil and geologic conditions</li> </ul>
<b>+STUART MYERS</b> <i>MB&amp;G</i> Environmental Services	<ul style="list-style-type: none"> <li>• 15 years of experience with environmental documentation, regulatory compliance and natural resource restoration</li> <li>• More than 30 ODOT/LPA transportation projects</li> </ul>
<b>JEAN OCHSNER</b> <i>ES&amp;A</i> Environmental Services	<ul style="list-style-type: none"> <li>• Over 26 years of experience in Endangered Species Act documentation</li> <li>• Expertise in environmental permitting and regulatory compliance; NEPA/SEPA documentation, surface water management and watershed planning</li> </ul>
<b>+LESLIE FINNIGAN, SR/WA</b> <i>UFS</i> Right-of -Way	<ul style="list-style-type: none"> <li>• Former ODOT Right of Way Project Manager and Senior Agent.</li> <li>• 26 years of experience in the right of way field. Currently is involved in all phases of the land acquisition and relocation process in a management capacity.</li> </ul>
<b>+STACY THOMAS</b> <i>JLA</i> Public Involvement	<ul style="list-style-type: none"> <li>• 10 years public involvement experience includes 6 years as Sr. Community Affairs Coordinator for ODOT Reg. 1 responsible for strategic communications, public outreach, and agency coordination.</li> </ul>
<b>LOIS COHEN</b> <i>DCA</i> Public Involvement	<ul style="list-style-type: none"> <li>• Public Involvement Lead on over 15 ODOT projects throughout the state, in communities large and small, on projects that were high impact, and, occasionally quite contentious</li> <li>• Successfully completed tasks and always delivered on time and on budget</li> </ul>
<b>R. DAVID FEINAUER</b> <i>ROWA</i> Right-of-Way	<ul style="list-style-type: none"> <li>• Certified General Appraiser with 40+ years of experience in appraisal review, negotiations, and relocation services</li> <li>• Solid understanding of Oregon land use regulations and impact on acquisitions</li> </ul>
<b>JO REESE, MA, RPA</b> <i>AINW</i> Cultural/Historic Resources	<ul style="list-style-type: none"> <li>• Precandidate Ph.D., Anthropology and 36 years of experience in history/archaeology</li> <li>• Thoroughly knowledgeable and experienced with Sect. 106 of the National Historic Preservation Act and in the information needed for NEPA</li> </ul>

## B. Qualifications and Experience to Self-Perform

For over 30 years, Otak has managed and successfully delivered complex interdisciplinary transportation projects for ODOT and LPAs. Otak employs experts in civil engineering, surveying and mapping, bridge design, water and natural resources, GIS, landscape architecture, architecture, planning, urban design, visualization, and construction management services. As the table below indicates, this broad spectrum of in-house expertise allows us to self-perform as a prime consultant well over 51% of the PE-design phase work of typical ODOT/LPA work order assignment. Otak PE-design services that can be self-performed on typical full-service transportation projects include:

- Project scoping and prospectus development
- Project coordination and management
- Field survey and mapping
- Hydraulic and scour studies and design
- Utility coordination and waterline/sewer design
- Roadway design
- Bridge assessments and design
- Landscape architecture
- Storm water management and design
- Public involvement/information support
- Cost estimates and specifications
- Construction bid assistance

The table below details three recent Otak-primed full-service transportation projects for which Otak self-performed over 51% of the PE-Design phase work.

### Otak Full-Service Transportation Projects

(started within the past 5 years)

			Design Phase Services & Consultant Responsibilities																
			Design Phase Cost			Project Management	Survey & Mapping	Hydraulic Analysis	Utility Coordination	Roadway Design	Bridge Design	Landscape Architecture	Storm water Design	Public Involvement	Construction Services	Geotechnical/HazMat	Environmental/Permits	Right-of-Way	Traffic
<b>I-5 @ Wilsonville Interchange</b> NTP: 12/2008 PS&E: 8/2010		Total:	\$3,090,000	(100%)	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	
		Otak:	\$1,825,000	(59%)	✓	✓		✓	✓	✓	✓	✓		✓					
		Subs:	\$1,265,000	(41%)					✓						✓		✓	✓	
<b>Fawcett Creek Culvert Replacement; Tillamook County</b> NTP: 8/2008 PS&E: 2/2009		Total:	\$309,000	(100%)	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	
		Otak:	\$217,000	(70%)	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓				
		Subs:	\$92,000	(30%)													✓	✓	✓
<b>Lake Road; Milwaukie</b> NTP: 8/2008 PS&E: 1/2011		Total:	\$1,023,000	(100%)	✓	✓		✓			✓	✓		✓	✓	✓	✓	✓	
		Otak:	\$542,000	(53%)	✓	✓		✓				✓	✓		✓				
		Subs:	\$481,000	(47%)													✓	✓	✓

## C. Key Staff Resumes

Resumes for the following key staff are presented in Appendix A using the ODOT Key Staff Resume form.

- Ron Jee, PE (Otak) – Project Manager
- Sheryl Walsh, PE, LEED AP (Otak) – Project Manager
- Doug Sarkkinen, PE, SE (Otak) – Structural Engineering
- Gary Alfson, PE (Otak) – Roadway Design
- Jack Carlson, PLS (Otak) – Survey
- George Machan, PE (Cornforth) – Geotechnical Engineering
- Kevin Timmins, PE (Otak) – Hydraulics
- Stuart Myers (MB&G) – Environmental
- Leslie Finnigan, SR/WA (UFS) – Right-of-Way
- Stacy Thomas (JLA) - Public Involvement

### 2.2.4 CLARITY OF PROPOSAL & CONFORMITY WITH REQUIREMENTS

No response required.

### 2.2.5 REFERENCES FOR PE-DESIGN SERVICES

Please see Appendix A for our project references submitted in the required PE Reference Questionnaire format. Each project is similar in nature to the types of projects described in the RFP and demonstrates Otak's experience and performance in managing multi-discipline team to complete the PS&E and bring the project to bid.

## QUALIFICATIONS FOR CA/CEI SERVICES

### CONTENTS:

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## INTRODUCTION

The Oregon Department of Transportation (ODOT, Agency) is seeking multiple professional services consultants to provide Construction Contract Administration/Construction Engineering and Inspection (CA/CEI) services necessary to deliver transportation-related projects according to ODOT standards, and when applicable, Federal Highway Administration (FHWA) standards. The Otak team has the capacity to provide these CA/CEI services for these projects with minimal oversight from ODOT or the Local Public Agency (LPA). Our proposed team is highly experienced and qualified to provide the necessary CA/CEI Services, as requested.

Otak has gained special understanding of ODOT/LPA projects as we have provided CA/CEI services on many projects throughout the state for all five ODOT regions, which we demonstrate in our "Similar Project Experience" table on page 21.

Below are key benefits that the Otak CA/CEI team brings to ODOT and statewide Local Public Agencies to successfully administer and inspect these projects:

- Construction project management staff with significant past experience on ODOT/LPA projects.
- Several key staff with many years of experience working for ODOT in construction project management and/or construction inspection roles.
- Vast experience working throughout the entire State of Oregon, including all five ODOT regions and a great variety of the cities and counties that make up the network of Local Public Agencies.
- Two key Quality Managers that have a combined 70 years of experience, 40 of those years working for ODOT.
- A pool of certified inspectors with substantial ODOT inspection experience, located throughout the state, and portable to work close to any project site.
- A wide variety of staff from entry level to senior staff with over 40 years of experience to suit the need of any type of project.
- A pool of Quality Control Compliance Specialists (QCCS) that can be drawn on for projects state-wide dependent on-site location, workload, and specialty experience.
- A consistent team where key staff are familiar with one another and have worked together on many projects, creating a cohesive unit providing excellent customer service, unparalleled responsiveness, and attention to detail.

## 2.2.6 PROPOSER'S PROJECT MANAGEMENT FOR CA/CEI

### A. Management and Organizational Structure

Otak's management and organizational structure for ODOT/LPA projects is comprised of a Principal-in-Charge, Price Agreement/Work Order Contract Manager, Contract Administrator/DBE Coordinator, Construction Project Managers, Quality Managers, and a variety of technical staff including certified inspectors, specialty inspectors, Quality Control Compliance Specialists (QCCS), and project administrators. This organizational structure will aid our CA/CEI services by providing:

- A single point of contact for WOC assignments and immediate response
- Outstanding customer service and responsiveness
- Appropriate levels of qualified construction project managers, inspectors, and other technical staff

Mike Peebles will serve as Principal-in-Charge (PIC), Ian Machan will serve as Price Agreement (PA) Manager and lead Work Order Contract (WOC) Manager, and Tonya Finley will serve as Contract Administrator /DBE Coordinator for this Price Agreement.

### Principal-in-Charge (PIC)

Mike's role on the project team is ensuring the proper level of resources are available for each project and that the client receives outstanding customer service and responsiveness. He will ensure that all ODOT/LPA projects have strong staffing continuity. Mike oversees the project assignments for Otak's Transportation and Infrastructure teams in Oregon. He meets with appropriate managers and task leads of the projects each week, while their project is active, to review project schedule, budget, staffing, and complex issues and provides corporate support of the project. As PIC, Mike's project involvement will be only as necessary to ensure the success of the project and client satisfaction. Mike will closely coordinate all assignments and major project decisions with Ian Machan, the PA/WOC Manager. Mike and Ian have worked together at Otak for over 11 years and have established great communication and have assembled highly qualified individuals to make up our CA/CEI team.

## Price Agreement / Work Order Contract Manager

As the PA Manager and lead WOC Manager, Ian Machan will work directly with Mike Peebles to determine project-specific construction project managers, and a team decision will be made to select the remaining key staff, including certified inspectors, Quality Control Compliance Specialists (QCCS), and other specialty services required by individual projects. Once selected for projects, Ian becomes the single point of contact for ODOT/LPA throughout the duration of the WOC and closely coordinates with ODOT and internal project staff.

## Contract Administrator/DBE Coordinator

Tonya Finley will serve as Otak's Contract Administrator and DBE Coordinator. Tonya is a certified federal contract manager and has over 20 years of contract administration and small business coordination experience associated with federal and federally-funded contracts. Tonya is a participant on the ODOT/ACEC A&E DBE Goal Setting Committee and the Small Business Administrator for Otak and has a thorough understanding of the requirements and goals associated with ODOT's DBE Participation, Aspirational Targets, and Civil Rights program. Tonya will be involved with the overall PA and with each individual WOC assigned to Otak.

## Construction Quality Managers

Ken Karnosh and Ron Jee have over 70 years combined experience and have performed quality management duties on many projects throughout their careers. Both have vast experience working for ODOT and as consultants on ODOT/LPA projects and translate this experience into a Quality Manager role in which they work closely with the WOC and Construction Project Managers, QCCS, and key technical staff to ensure all quality needs of a specific project are being met. Our Quality Managers are involved with Regional Assurance Specialist (RAS) reviews and facilitate open communication between all parties including the RAS, the construction contractor, QCCS, ODOT Independent Assurance, and the project manager.

## Construction Project Managers

The individual construction project management staff shown in the organization chart have been selected based on their expertise and experience leading CA/CEI teams on ODOT and/or LPA projects with ODOT/LPA oversight. Our team of construction project managers has the depth and breadth of experience to handle projects issued under this Price Agreement. These managers are empowered to lead the project from the outset by selecting team members based on expertise and familiarity with the project location and client. Project inspectors and other support staff are assigned to the project for the duration and are responsible for delivering specific project elements. This holds true for both internal staff and subconsultants.

Our team of Construction Project Managers is comprised of individuals with many years of experience working at ODOT in addition to vast experience working for consultants on ODOT/LPA oversight projects. Understanding the consultant and Agency roles and responsibilities, the key issues for ODOT/LPA, and the variety of requirements associated with State and Federal funding assist our project managers in providing the best service to our clients.

## How Subcontractors will be Selected, Utilized, and Managed to Complete Projects

Otak's strong relationship with a wide variety of subcontractors allows us to provide expert services across a broad geographic and technical spectrum. Otak currently has a sufficient internal pool of construction management and inspection personnel to typically staff numerous concurrent projects, but our team offers several outstanding subcontractors who offer specialty services, are located throughout the state, and have excellent resumes to bolster our team. Additionally, we have included these subcontractors to provide additional depth and flexibility to address any assignment, assist in meeting the MWESB aspirational targets, and achieve any DBE participation goals. Otak will utilize DBE/MWESB certified firms where their involvement provides benefit to the project. The PIC, PA/WOC Manager, and the construction project manager will select the most qualified and experienced subcontractors based on:

- Expertise required
- Experience and qualifications with similar projects, ODOT, stakeholders, and similar locations
- Current project workload and availability
- DBE/MWESB status
- Cost effectiveness
- Office location(s), mobile inspection availability

Subcontractors are completely integrated into the project team, including weekly team meetings, schedule responsibilities, managed deliverables, and quality control reviews. Subcontractors are held to the same level of accountability as internal disciplines allowing the project to proceed smoothly and efficiently. Team work sessions integrate all disciplines, including subcontracted disciplines, and proactively address issues and develop solutions. When appropriate, subcontractors also attend project meetings with the team, client, and stakeholders.

Our key subcontractors will be utilized to enhance our project team in a variety of positions, but several key elements drive us to make these selections:

- Selecting subcontractor inspectors and QCCS staff that are located close to specific project sites to reduce or eliminate project-related travel expenses and per diem
- Selecting subcontractor inspectors that possess certain specialty inspection certifications or experience that is required by a specific project

- Selecting subcontractor inspectors that have outstanding reputations and experience in certain jurisdictions, regions, and disciplines

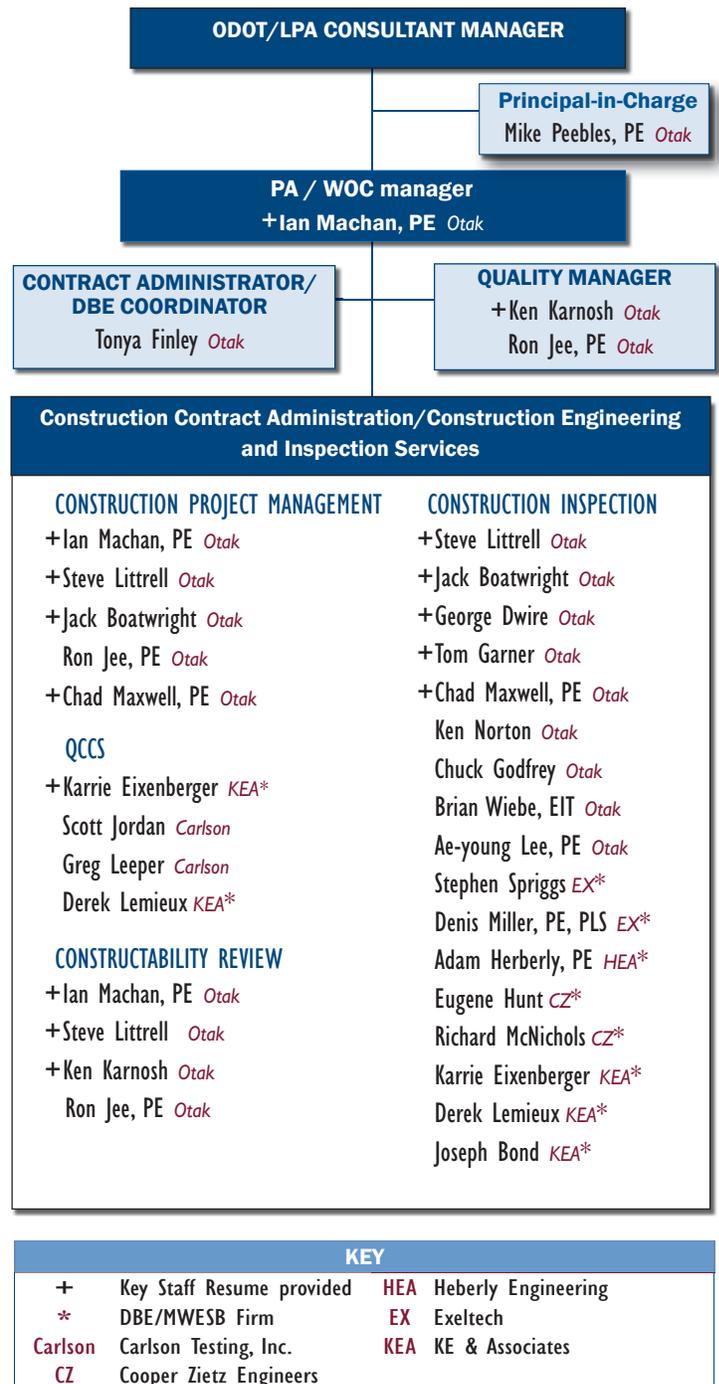
We have assembled our team of subcontractors based on the assumption that Engineer of Record (EOR) support services will be provided by the project-specific EOR (ODOT or design phase consultant) and have not explicitly shown engineering disciplines in our organization chart. However, being a multi-discipline engineering firm, Otak has the capacity and ability to provide many EOR services and we have an extensive network of subcontractors we can enlist to provide specialty services such as geotechnical, environmental, and right-of-way consultation. The organization chart on this page identifies Otak and subcontractor key team members and their proposed role for the CA/CEI phase of construction projects.

## B. Coordinating and Expediting the Project Elements

Otak utilizes a proactive approach to coordinating and expediting project elements to meet schedules. Project schedules in the CA/CEI phase are unique in that an external party (construction contractor) has primary control and influence over the schedule. Understanding how ODOT/LPA/Consultant can proactively work with construction contractors to establish, monitor, and adjust schedules during construction is a key part of every project and Otak accomplishes this utilizing the following key processes:

### Partnering

Otak views all stakeholders of a project as an important voice to be considered during the construction process. We know that strong working relationships built on cooperation, ethics, expertise, and experience are essential for a successful project. Our team routinely works with ODOT/LPA, construction contractors, contract agencies, utility companies, regulatory agencies, affected property owners, interested citizens and community groups and we take pride in our role of moderating communication between all parties. During construction, a key partnership that our Construction Project Managers and inspectors attempt to establish early on in the project is with the construction contractor. Too often, the relationship between the Owner/Owner's Rep and the construction contractor is strained and sometimes adversarial. We have found that the projects with the highest success rate, least change orders and claims, and best client satisfaction are those built on a strong Owner-Consultant-Contractor relationship where each party trusts the other and open communication assists with a teamwork concept. We also stress the importance of a similar partnering attitude to our project inspectors to establish in the field between themselves, the construction contractor and the general public. Oftentimes, the overall tone and public perception of a project is based on the attitude of surrounding property owners and businesses, and we attempt to establish immediate relationships with these key project stakeholders.



## Defining Project Goals and Objectives

Otak will work closely with ODOT/LPA in defining the project goals and objectives from the project outset. We identify the construction standards (both ODOT/FHWA and those unique to applicable Local Public Agencies) and criteria in attaining the goals and objectives, keeping the team focused on efficiently managing and inspecting the project. Our construction project managers review and distribute the project criteria with the team members prior to the start of construction, and regularly check in with staff throughout the duration of the project to reiterate goals, communicate schedule and budget items, and ensure the project is staying on track to meet these goals.

## Adjustment of Schedules When Needed

The CA/CEI phase of a project differs from the PE/Design phase in terms of schedule control in that neither ODOT/Local Public Agency nor Otak is in full control over the schedule. In the construction phase, the construction contractor's means and methods often dictate the order of activities and overall project schedule duration. We understand and appreciate the fine balance of allowing the contractor to select and employ their own means and methods and the need to choose opportunities to get involved with schedule recommendations, offer possible alternative suggestions, and work as a team with the contractor to monitor the schedule. At Otak, we pride ourselves in our proactive attention to scheduling and continually meet with the Owner and contractor to discuss the project schedule at levels of detail ranging from daily to weekly to overall project schedules.

Our experience has taught us that close communication and collaboration with ODOT and the stakeholders is required to define how project needs are adjusted and to what extent. Working collaboratively is important in any phase of work, but especially in the CA/CEI phase when considering that during construction, time really is money and schedule issues often turn into budget issues. Our team utilizes the following philosophy in managing adjustments to schedules:

- Determine the initial cause for the schedule adjustment
- Determine the impact of the adjustment with each associated activity
- Identify options and methods to respond to the adjustment to resolve issues and keep project on track
- Examine the project schedule to identify scheduled tasks that can be accelerated
- Ensure clear communication of the revised schedule to all team members
- Monitor and mitigate the effects of the revised schedule

In many instances, it may be the construction contractor's contractual obligation to be the party responsible for performing the schedule review, analysis, and modifications described above. However, we will always stay engaged in this process to ensure the project's original goals and objectives are still being met, that contractor schedule decisions are in line with ODOT/LPA expectations, and that all potential future schedule impacts have been considered.

Though it is often the construction contractor that utilizes the scheduling software to develop their official project schedule, our Construction Project Managers and many of our inspectors are experienced in the use of project scheduling software to develop and

maintain timelines, review critical path items, and utilize resource leveling. Using these graphical tools allows immediate and visual determination of potential deviations in the project schedule and assists us in sharing clear information with our clients and the public. This allows for early notification to key stakeholders and timely collaborative discussion of acceptable responses.

## Adjustment of Level of Effort to Meet Schedule

Otak is known for innovation and has deep company resources to focus on any project situation. With a significant pool of Construction Project Managers and inspection staff to draw upon, we are dedicated to keeping our ODOT commitments and will devote appropriate resources needed to keep the assigned project on schedule. We match up the staff availability, required expertise, and cost-effectiveness with the assignment and budget. We have many inspectors who are available to work extended hours to cover extra time needs when construction scheduling requires, we have numerous inspectors that can be assigned to cover unusual work schedules such as night and weekend work, and we have on-call staff who are available at a moment's notice to assist if unanticipated workload changes occur. Weekly staffing meetings identify projects needing additional personnel and over-staffed projects in a continual process to properly manage available staff and capability. Balancing of staff is performed each week.

Our Team utilizes the following philosophy in managing adjustments to our level of effort to meet the proposed schedule:

- Available depth of staff expertise
- Assign tasks to appropriate staff
- Standardize inspection activities and details
- Continually communicate with ODOT/LPA to confirm task expectations
- Continually evaluate the proper level and cost of resources required to complete a particular task item
- Monitor task activities for meeting statement-of-work, and project criteria
- Identify and prioritize critical path items

As all of these methods to evaluate and address schedule changes are utilized, they are done in a manner where the quality component of the project remains intact. Our Quality Managers are involved in scheduling discussions, but also view their responsibility to monitor project quality independently of the schedule. This ensures that regardless of the project schedule, the project quality requirements are being met which will protect ODOT/FHWA funding participation and will satisfy project quality reviews.

### C. Quality Control Procedures & Policies for CA/CEI

Otak has an outstanding track record on past work for various public-sector clients including municipalities and state and federal agencies. We have consistently received praise from our clients regarding the high quality of our construction project management, engineering, administration, and inspection services, as well as our responsiveness to time constraints and budgets. We have worked with clients to assist them through what is often a maze of State and Federal regulations.

Otak has established Quality Assurance policies/guidelines for efficiencies and consistencies of process and product. We approach quality and cost control through our company-wide documentation including our Project Management Handbook and QA/QC program. In addition, for ODOT construction projects, we implement the process outlined in the ODOT Quantity and

Quality Control Program. These documents establish criteria for employees to implement quality, cost, and schedule control on a daily basis. We focus on building quality into all of our work from the beginning of a project through all phases to completion. We also ensure that our subcontractors apply equivalent quality and cost control procedures on all their work.

All deliverables from letters to shop drawing and submittal reviews receive an independent QA review by assigned staff prior to submittal to the client or contractor. All deliverables by a team subcontractor are reviewed by project staff for consistency with project objectives and criteria prior to submittal. These deliverables include but are not limited to letters, memorandums, reports, plan/specification revisions, test summary reports, field inspection reports with proper supporting data, shop drawings, pay notes, change orders, load ratings and as-constructed drawings.

CA/CEI QUALITY CONTROL PROCEDURES	
Quality Control Task	Highlights
Complete ODOT Quality Assurance/ Contract Administration (QA/CA) Plan	<ul style="list-style-type: none"> <li>Complete standard ODOT template and submit to ODOT for review and approval prior to start of construction</li> </ul>
Establish Filing System	<ul style="list-style-type: none"> <li>Organize &amp; Log project documentation, including correspondence, RFIs and submittals,</li> </ul>
List of Required Project Documents	<ul style="list-style-type: none"> <li>Items such as schedule, subcontracts, traffic control plan, erosion control monitoring reports, pollution control plan, quality material &amp; testing data, and labor compliance documents and distribute list to Contractor prior to construction for discussion</li> </ul>
Breakdown of Lump Sum Pay Items	<ul style="list-style-type: none"> <li>Develop with Contractor for partial payment of LS items on progress estimates</li> </ul>
Certified Construction Inspectors	<ul style="list-style-type: none"> <li>Utilize inspectors certified specifically for the specialty areas of construction</li> <li>Technical references are ODOT Construction Manual, Inspector's Manual, and Manual of Field Test Procedures, Field-Tested and Non-Field-Tested Material Acceptance Guides</li> <li>Inspectors keep proper quality and quantity documentation for non-field tested bid items for progress and final estimates, work with ODOT Regional Assurance Specialist (RAS).</li> </ul>
Quality Control Compliance Specialist (QCCS)	<ul style="list-style-type: none"> <li>QCCS and administrative staff keep proper quality and quantity documentation for field-tested bid items for progress and final estimates, work with ODOT RAS.</li> </ul>
Certified Technicians for Material Sampling, Testing, Mix Design, Placement, & Production	<ul style="list-style-type: none"> <li>QCCS and inspectors confirm proper ODOT certifications and procedures performed for contractor QC activities.</li> </ul>
Verification Quality Assurance Testing	<ul style="list-style-type: none"> <li>Performed by ODOT certified staff or representative(s)</li> <li>QCCS and inspectors coordinate with contractor and ODOT to set up verification testing and ensure proper frequencies for testing are being met.</li> </ul>
Engineer of Record Support	<ul style="list-style-type: none"> <li>EOR and design staff to review all technical submittals and survey data, resolve design issues, approved design changes, and perform design services</li> </ul>
Audits of Quality and Quantity Documentation	<ul style="list-style-type: none"> <li>Performed by ODOT RAS on periodic basis such as quarterly. Construction project managers, inspectors and QCCS meet ahead of time to ensure documentation is prepared and checked properly for review</li> </ul>
Final Project Documentation	<ul style="list-style-type: none"> <li>Documentation that supports final quantities and quality to be submitted to ODOT at end of project, assembled according to the ODOT Construction Manual and submitted accordingly.</li> </ul>

Otak is familiar and experienced with the Quality Control required for ODOT projects, and the procedures in the Construction Manual. We commit to adhering to the ODOT specifications and standard practice. Over the last ten years, all of the ODOT/LPA projects in which Otak was responsible for the CA/CEI services have had the quality and quantity documentation accepted, and the funding fully participated.

## 2.2.7 PROPOSER'S COST EFFECTIVENESS FOR CA/CEI

### A. Cost Effectiveness

Project budget management begins before the project starts. When we receive a project assignment, we spend considerable time developing a project work plan. We begin development of the work plan as we prepare our scope of work document and fee estimate for the project. The work plan clearly describes the scope of work, deliverables, and labor hours to accomplish the various tasks, and a schedule showing when products are to be delivered and when key milestones for the project occur. We assemble our team in a budget-conscious manner, and work with our clients to offer a variety of staff experience with a rate table that correlates to their experience level. This allows us to keep cost down on projects or project phases where a senior staff member may not be absolutely necessary to achieve the desired result. We have a wide range of personnel that we employ that can fit any project need, and we work as a team with our client to put together the project team and work plan that best fits the budget.

At Otak, internal budget reports are produced and reviewed by Project Managers on a weekly basis. These reports are used to review the expenditures in comparison to total budget amounts for an overall assessment of the project progress. Regular monitoring allows time to take swift action, if adjustments are necessary.

Any potential budget deviations are discussed early with the responsible task managers for identification of reasons and resolution including development of an action plan. Otak will consider actions to balance the budget, such as using more efficient operations and resources, eliminating unnecessary work while maintaining the same quality deliverable, evaluating adequate staff, and adjusting the schedule.

For CA/CEI contracts, it is not unusual for scopes and budgets to change as a project progresses. At times, unanticipated developments or changing conditions occur. Often, issues arise when the progress reveals more details than were available at project initiation. As soon as changes become apparent, we advise our client of the situation and proactively suggest solutions. Often, if scope and budget increases are required in one area, scopes and budgets can be reduced in another area in order to maintain the overall integrity of the budget without sacrificing quality. For example, with a construction project, there may be

Otak understands that ODOT already has a very straight-forward and process-oriented quality control plan established for construction projects. We routinely follow this process on all ODOT/LPA projects, and often implement this process (or a similarly modified process) on non-ODOT/LPA CA/CEI projects. In addition, we have supplementary internal QA/QC procedures we adhere to and have summarized many of the main concepts in the "CA/CEI Quality Control Procedures" table on page 17.

an opportunity for a cost reduction proposal, or an opportunity to redesign to better fit the conditions of the project. When a work order amendment is needed due to out-of-scope work, we notify our client immediately, and proceed after the client authorizes the work. At Otak, we feel a strong sense of ownership throughout the life of the assigned project. For this reason, we fully commit ourselves to successfully completing the project within the established budget.

Our CA/CEI team is also experienced in teaming with ODOT and Local Public Agencies to provide concurrent services to reduce overall project costs. We understand the budget limitations associated with many cities and counties throughout the state, and we appreciate and facilitate "outside the box" teaming possibilities to save our clients money. An example of this teaming and cost-saving concept includes our Jones Creek (Southside Rd) Bridge project in Josephine County, where the County self-performed a portion of the construction work while the contractor performed the bridge construction. Otak facilitated the project scheduling coordination and kept the project on track. Utilizing County forces was a means of putting County staff to work while completing a project with minimal State funding available. A second example of teaming with an LPA is our Fairgrounds Road: US97 – Culver Highway project in Madras. The funding for this project was limited and the City did not have the budget to hire a consultant to perform full CA/CEI services. Otak proactively worked around this issue by recommending to the City to look into using a City inspector and administrator on a part-time basis to assist with Otak CA/CEI duties. This decreased the Otak contract value, allowed the City to stay within their budget, and put City staff to work. Understanding our client's budget expectations and limitations is a key element of our CA/CEI role, and we are constantly aware of the project cost in order to protect the LPA and ODOT from incurring additional and unwanted costs.

When it comes to budgeting for and minimizing travel, lodging, and per diem expenses on a project, we have assembled our team in a manner which allows us to draw from staff located throughout the state, therefore eliminating or minimizing travel. Additionally, we employ numerous inspectors that own travel

trailers or RVs that enjoy staying at nearby RV parks while performing their inspection activities. We have found that the use of travel trailers and RVs decreases travel, lodging and per diem costs by as much as **80%**. Examples of our efforts to decrease these costs on recent projects are illustrated in the following table.

EXAMPLES OF REDUCED TRAVEL, LODGING AND PER DIEM EXPENSES			
PROJECT	LOCATION	EFFORT TO REDUCE TRAVEL, LODGING, PER DIEM EXPENSES	ESTIMATED SAVINGS (COMPARED TO TRAVEL, NIGHTLY LODGING & PER DIEM)
1st St & Main Ave Sidewalks and Bike Lanes	Irrigon	Inspector relocated to furnished apartment within blocks of site and utilized long term rates	Approx. \$38,000
US101 @ Long Prairie Road	Tillamook	Inspector used personal travel trailer and stayed at RV Park within 2 miles of site	Approx. \$30,000
Fawcett Creek (S. Prairie Rd) Bridge	Tillamook	Inspector used personal travel trailer and stayed at RV Park within 1 mile of site	Approx. \$25,000
3rd Street Enhancement Project	Tillamook	Inspector used personal travel trailer and stayed at RV Park within 1 mile of site	Approx. \$45,000
Fairgrounds Road: US97 to Culver Highway	Madras	Inspector relocated and stayed with family within 10 miles of site	Approx. \$15,000
Elliott Creek Road: Slate Creek Bridge	Josephine Co.	Inspector used personal travel trailer and stayed at RV Park within 10 miles of site	Approx. \$15,000
Port of Astoria Pedestrian Paths	Astoria	Inspector relocated to furnished apartment within 1/2 mile of site and utilized long-term rate	Approx. \$12,000
Bundle 414: Mckay Creek-Silvies Slough	ODOT Reg. 5 (7 sites)	Inspectors relocated to furnished apartments within 5-50 miles of sites and utilized long term rates	Approx. \$175,000

## B. Developing Fair and Accurate Fee Estimates

At Otak, we believe a successfully budgeted project requires significant planning and analysis well before the project begins. Our project managers dedicate the necessary time and energy into thoroughly researching the project goals and interests, meeting with the client to scope the work onsite, discuss client expectations, construction complexity, location, anticipated schedule (if available), and we begin to form a work plan that mirrors the anticipated project conditions. The following table illustrates the process followed to develop an estimate for services on a typical CA/CEI project:

I. GATHER PERTINENT PROJECT INFORMATION	2. DRAFT SCOPE OF WORK (SOW)	3. FINALIZE SCOPE OF WORK, BREAKDOWN OF COST (BOC)
<ul style="list-style-type: none"> <li>Project goals</li> <li>Client expectations</li> <li>Construction complexity</li> <li>Project location</li> <li>Anticipated schedule (if not available, a draft schedule will be created)</li> <li>Available budget (if known)</li> <li>Contractor (if known)</li> <li>Construction season (to determine efficiency, work schedules, etc)</li> <li>Construction work types (to determine inspection needs and appropriate staffing)</li> </ul>	<ul style="list-style-type: none"> <li>Meet with Agency to discuss expectations, schedule, budget, deliverables</li> <li>Utilize ODOT CA/CEI Scope of Work document as a template and modify with project specifics</li> <li>Create contingency tasks for tasks with unknown or difficult to estimate levels of effort</li> <li>Submit draft SOW to Agency for review/comment</li> </ul>	<ul style="list-style-type: none"> <li>Address Agency SOW review comments and finalize SOW</li> <li>Assign appropriate staff and level of effort for each SOW task to complete BOC worksheet</li> <li>Submit SOW and BOC to Agency for review</li> <li>Address Agency comments and submit final SOW and BOC</li> </ul>

The tasks associated with the CA/CEI phase of a project are usually very consistent from project to project, which allows Otak to utilize past project data to accurately hone our estimates for future projects. One item that always changes with any given project is the proposed construction schedule. In order to successfully budget a project, it is critical to take the time to analyze the proposed construction schedule (if provided). If a schedule is not provided, it is even more important to develop an accurate schedule with stated assumptions to base an appropriate level of effort for management, administration, and inspection tasks. We have very experienced project managers that have dedicated many years of their careers to construction and scheduling and can accurately assemble assumed construction schedules for estimating purposes.

Otak often employs the use of contingency tasks to ensure that estimates for CA/CEI services are fair and reasonable for both the Agency and Otak. The level of effort for several tasks often associated with the CA/CEI phase can greatly vary depending on unknown factors that must be assumed at the time of SOW/BOC negotiation, including the construction contractor's weekly work

schedule and the overall duration of the project. Standard SOW tasks such as Construction Contract Administration, Weekly Project Progress Meetings, Monthly Preliminary Progress Estimates, and Construction Activity Monitoring are all directly tied to the duration of a project. The following is an example of how Otak has addressed this issue in the past.

**Elliott Creek Road: Slate Creek Bridge** – Due to the late bid date for this project, the construction of this bridge was pushed back later in the 2012 construction season than was ideal. The project team anticipated that there would likely be enough time to complete the project in 2012, but included a provision that would allow the Contractor to complete work in 2013 if necessary. Rather than assume CA/CEI services would be required for the longer duration, Otak budgeted for construction to complete in 2012, and included a contingency task for 2013 work if it became necessary. This reduced the non-contingency budget and demonstrated to the Agency that the level of effort budgeted under the non-contingency tasks reflected a fair and reasonable effort.

## 2.2.8 PROJECT TEAM AND QUALIFICATIONS FOR CA/CEI SERVICES

### A. Experience of Project Manager

Otak is set up to offer several excellent construction project managers who excel in managing and administering ODOT and LPA projects through the duration of the CA/CEI phase. As the PA Manager and lead WOC Manager, **Ian Machan** will lead the overall team of managers and will work closely with Mike Peebles (PIC) to assign key project management roles on a project-by-project basis. Ian has over 10 years of experience negotiating ODOT WOCs, managing and administering ODOT/LPA CA/CEI projects, has managed construction projects in all five ODOT regions on both ODOT and Local Public Agency projects, and has developed key contacts at ODOT, FHWA, and a variety of local agencies throughout the state. Ian has managed over 25 ODOT/LPA construction projects ranging in total cost from \$250,000 to \$35,000,000. Ian has worked closely with Otak's pool of construction inspectors and has developed a communication and coordination protocol that has proven effective over the years.

In addition to Ian's role as a Construction Project Manager, he also manages ODOT/LPA Preliminary Engineering (PE)/Design projects, which leads to consistency between the design and construction phases on projects in which Otak performs both PE-Design and CA/CEI services. Ian is involved on all Otak CA/CEI projects, whether directly performing the construction project management duties or providing oversight duties on projects managed by alternate Otak construction project managers. This involvement ensures excellent project communication, a cohesive team, and an unparalleled responsiveness to our client.

We have included a table on the following page that highlights many of our projects in which Ian and the rest of the Otak team have led the CA/CEI phase of ODOT/LPA construction projects. These projects are all similar in nature to those expected under this Price Agreement and have been completed within the past five years.

### Additional Construction Project Management Staff

Supporting Ian in project management roles are Steve Littrell, Ron Jee, Jack Boatwright, and Chad Maxwell who have over 100 years of combined ODOT/LPA construction experience. **Steve Littrell** was a Construction Project Manager for ODOT Region 2 prior to retiring in 2004 and has a vast amount of experience related to the ODOT CA/CEI process and procedures. After retirement from ODOT and prior to joining Otak, Steve also worked for OBEC Consulting Engineers as a Construction Project Manager and led numerous construction projects and also performed key inspections as required. Steve brings a wealth of experience and knowledge and has a proven track record for excellent project management skills.

**Ron Jee** was employed by ODOT for 22 years, being Structural Engineering Manager in the ODOT Bridge Engineering Section and overseeing consultant bridge on-call contracts for 5 years. During the recent 15 years, Ron has served as contract manager for two consulting firms and ODOT on-call contracts. He has the experience with private and public projects and understands the business operation and requirements of ODOT. Ron has recently managed the CA/CEI phase of two significant interchange construction projects on I-5 in Wilsonville and Medford spanning several years and with a combined contract value of over \$70M.

SIMILAR PROJECT EXPERIENCE IN LAST 5 YEARS									
PROJECT NAME	LOCATION	COST	FEDERAL FUNDING	BRIDGE	PAVING	UTILITIES	FLATWORK	DRAINAGE	ELECTRICAL
1st St. & Main Ave. Sidewalks & Bike Lanes	City of Irrigon	\$2.3M	Y		X	X	X	X	X
3rd Street Enhancement	Tillamook County	\$3M	Y		X	X	X	X	X
Days Creek (Tiller-Trail Hwy) Bridge	Douglas County	\$1.4M	N	X	X	X	X	X	
Diamond Creek (Tiller-Trail Hwy) Bridge	Douglas County	\$2.2M	N	X	X	X		X	
Elliott Creek Rd: Slate Creek Bridge	Josephine County	\$900K	Y	X	X	X		X	
Fairgrounds Rd: US97 - Culver Hwy	City of Madras	\$540K	Y		X	X	X	X	X
Fawcett Creek (S. Prairie Rd) Bridge	Tillamook County	\$1M	Y	X	X	X		X	
Jones Creek (Southside Rd) Bridge	Josephine County	\$400K	N	X	X	X		X	
McKay Creek-Silvies Slough (Bunde 414)	ODOT Region 5	\$35M	Y	X	X	X	X	X	
Mill Creek (Capitol St NE) Bridge	City of Salem	\$2.4M	Y	X	X	X	X	X	X
OR47 & E. Main St Sidewalks	City of Gaston	\$540K	Y		X	X	X	X	X
Port of Astoria Pedestrian Paths	City of Astoria	\$1.1M	Y		X	X	X	X	X
SE Lake Rd: Oatfield Rd - Where Else Ln	City of Milwaukie	\$2.8M	Y		X	X	X	X	X
Upper Sucker Creek (Holland Loop) Bridge	Josephine County	\$2.6M	N	X	X	X		X	
US101 @ Long Prairie Rd	Tillamook County	\$1.1M	N		X	X		X	X
US30: Portland Rd-Crown Zellerbach Rd	City of Scappoose	\$250K	Y		X	X	X	X	

**Jack Boatwright** is a unique project manager in that he has often performed both the project management and inspection roles concurrently on many of his past projects. Jack is a tremendous multi-tasker and has developed a system that allows him to successfully perform these two duties simultaneously out of a field office. Jack will be available to work in this capacity or to perform individual project management or inspection services, as required by workload. In addition to his time at Otak, Jack has over 24 years of experiences working as a project manager and inspector for ODOT and worked as a project manager and senior construction inspector for HDR/OBDP for 8 years.

**Chad Maxwell** is an Assistant Project Manager with a wealth of construction inspection experience since 2004 and has assisted with managing numerous ODOT CA/CEI projects within the past

three years. Chad also has a strong background in design, utility coordination, and constructability which lends itself very well to anticipating and eliminating potential construction issues before they escalate to bigger issues. Chad has the ability to lead smaller project efforts or provide support to other project managers on larger, complex projects.

Key Staff Resumes for Ian, Steve, Jack and Chad per Section 2.2.8B are provided in Appendix B. As shown in our organization chart on page 15, we have significant capabilities beyond these staff to supplement as needed dependent on project workload, required expertise and experience, and project location. We offer the following table illustrating other notable staff and a short summary of their qualifications and experience.

STAFF / ROLES	EXPERTISE & BENEFITS TO THE OTAK TEAM
<b>RON JEE, PE</b> <i>Otak</i> Construction Project Manager/ Quality Manager	<ul style="list-style-type: none"> <li>• 30+ years of experience includes 22 years with ODOT Bridge and Construction group</li> <li>• 20+ years providing quality management on projects and managing work order contracts, complex transportation projects, and interdisciplinary teams for both PE and CA/CEI phases of ODOT/LPA projects</li> </ul>
<b>KEN NORTON</b> <i>Otak</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 30+ years of experience including over 20 years with ODOT as an inspector, material sampler and tester, and local programs administrator.</li> <li>• Thorough understanding of ODOT/FHWA funding requirements and associated impacts on construction projects.</li> </ul>

*table continued next page...*

STAFF / ROLES	EXPERTISE & BENEFITS TO THE OTAK TEAM
<b>CHUCK GODFREY</b> <i>Otak</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 30+ years of experience including over 25 years with ODOT as an inspector and construction project manager.</li> <li>• Tremendous experience both at ODOT and Otak managing the quality assurance/quality control process throughout construction</li> </ul>
<b>BRIAN WIEBE, EIT</b> <i>Otak</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 5+ years of experience in construction inspection and erosion control monitoring.</li> <li>• Strong background in ODOT/FHWA material quality and quantity documentation and labor compliance monitoring</li> </ul>
<b>AE-YOUNG LEE, PE</b> <i>Otak</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• Over 7 years of experience related to bridge and structural inspections.</li> <li>• NBI certified bridge inspector and has performed structural inspections on several ODOT and LPA structures</li> </ul>
<b>STEPHEN SPRIGGS</b> <i>Exeltech*</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 30 years of experience as a senior construction inspector specializing in roadway and bridge construction inspection on projects ranging from \$1M to \$150M.</li> <li>• Strong background in material testing and quality assurance and his experience includes four years as a quality assurance specialist.</li> </ul>
<b>DENIS MILLER, PE, PLS</b> <i>Exeltech*</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 40 years of experience includes 30 years with ODOT providing inspection of roadways and other public works projects</li> <li>• The primary paving inspector for ODOT's I-5: Wilsonville to Hayesville Interchange project and has substantial design-build experience.</li> </ul>
<b>ADAM HERBERLY, PE</b> <i>HEA*</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 13 years experience includes 9 years managing and inspecting LPA or ODOT owned facilities.</li> <li>• Has all ODOT inspection certifications and is located in Douglas County, providing central location for Region 3 services</li> </ul>
<b>EUGENE HUNT</b> <i>CZ*</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 11 years of construction inspection experience on ODOT/LPA construction projects specializing in bridge and deep foundation construction.</li> <li>• Performed construction inspection throughout the state and is familiar with many local agencies and all five ODOT regions</li> </ul>
<b>RICHARD MCNICHOLS</b> <i>CZ*</i> ODOT-Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 22 years of experience on ODOT/LPA construction projects including substantial paving and structure experience</li> <li>• Currently holds ODOT certifications in general, bridge and drilled shaft construction inspection</li> </ul>
<b>SCOTT JORDAN</b> <i>Carlson</i> QCCS	<ul style="list-style-type: none"> <li>• 33 years of experience as President of Carlson Testing and assisted ODOT by providing input during development of QCCS position</li> <li>• Has worked as a QCCS since program inception and also manages Carlson Testing pool of QCCS and certified technicians.</li> </ul>
<b>GREG LEEPER</b> <i>Carlson</i> QCCS	<ul style="list-style-type: none"> <li>• Over 30 years of experience in construction material testing and QA/QC.</li> <li>• Supported by Carlson Testing's pool of QCCS and certified technicians to assist throughout the state as required.</li> </ul>
<b>DEREK LEMIEUX</b> <i>KEA*</i> QCCS / ODOT Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 27 years of experience in construction services including 7 years performing QCCS services on ODOT projects</li> <li>• Holds numerous ODOT inspection certifications, performing general inspection for large heavy civil construction projects including paving and bridge structures</li> </ul>
<b>JOSEPH BOND</b> <i>KEA*</i> QCCS / ODOT Certified Construction Inspector	<ul style="list-style-type: none"> <li>• 8 years of experience in laboratory and field testing, construction inspection and 4 years serving as an ODOT QCCS</li> <li>• Holds numerous ODOT inspection certifications, performing general inspection for large heavy civil construction projects including paving and bridge structures</li> </ul>

\*DBE/MWESB Firms

## **B. Key Staff Resumes for CA/CEI Services**

Ian Machan, PE will be in responsible charge of all CA/CEI services. Resumes for the following key staff are presented in Appendix B using the required ODOT Key Staff Resume form for CA/CEI Services:

- Project Manager – Ian Machan, PE
- Quality Control Manager –Ken Karnosh
- Quality Control Compliance Specialist (QCCS)–  
Karrie Eixenberger (KEA)
- ODOT-Cerfied Construction Inspectors – Steve Littrell, Jack Boatwright, George Dwire, Tom Garner, and Chad Maxwell, PE

## **2.2.9 CLARITY OF PROPOSAL & CONFORMITY WITH REQUIREMENTS**

No response required.

## **2.2.10 REFERENCES FOR CA/CEI SERVICES**

Our recent project and individual staff experience, coupled with our history working together, establishes an Otak CA/CEI team that can effectively complete projects under this Price Agreement. In Appendix B, Otak has provided four reference forms for our most relevant and recent projects that demonstrate our capabilities to successfully perform CA/CEI services on ODOT/LPA construction projects.

## APPENDIX A

Key Staff Resumes for PE-DESIGN SERVICES

References For PE-DESIGN SERVICES

## KEY STAFF RESUMES

**Consultant Name:** Otak, Incorporated;    **RFP #:** 25134    **[OR] Mini-Solicitation #:** \_\_\_\_\_

**Project Name:** Full-Service A&E Price Agreements for ODOT and Local Agency Transportation Projects

<p><b>Name &amp; Title:</b> Sheryl Walsh, PE, LEED AP</p> <p>Senior Project Manager/Roadway Engineer</p>	<p><b>Experience on relevant projects:</b></p> <p><b>OR 219 (North College Street): Vermillion-Aldercrest Sidewalk &amp; Bike Lanes; Newberg, Oregon</b>—Project Manager - Sheryl is the project manager for this project to add approximately 2,500 feet of sidewalk and bikes lanes along OR 219 in the City of Newberg. She is responsible for managing the project team, which includes ODOT, and coordinating all aspects of this federally funded project. This project will provide connectivity between two schools and a city park, as well as to downtown Newberg from neighborhoods north of the city. Construction is planned for late 2013.</p> <p><b>Battle Creek Property Redevelopment; Salem, Oregon</b>—Project Manager - Sheryl was the project manager for Phase 1 of the redevelopment of the former Battle Creek Golf Course in SE Salem. This 80-acres site, of which approximately 60 acres is City owned, houses the confluence of Waln, Battle, Scotch, and Powell Creeks. Phase 1 included construction of a new collector street (Waln Drive) with bridge over Waln Creek crossing the site to serve a proposed elementary school, future city park, and parcels zoned for residential and commercial development. Phase 1 also included the realignment and regrading of Waln Creek and significant on-site grading work to provide compensatory flood storage and stormwater detention. Frontage improvements, including sidewalks and bikes for approximately 2,000 linear feet, and new water and sanitary sewers lines were also included in the project. Construction was completed in August 2012.</p> <p><b>Aumsville Highway Improvements; Salem, Oregon</b>—Project Manager - Sheryl is the project manager for this project to widen Aumsville Highway and improve traffic circulation throughout the Mill Creek Corporate Center Urban Renewal Area. In partnership with ODOT, the city of Salem plans improvements throughout the project corridor including stormwater facilities, curbs and sidewalks, street lights, traffic signal improvements, wastewater collection and water distribution upgrades, and landscaping. Construction is scheduled for spring of 2013.</p> <p><b>Crescent Connection Trail; Beaverton, Oregon</b>—Project Manager - ODOT selected Otak to provide design services on the Crescent Connection Trail in Beaverton, Oregon. The Cedar Hills Boulevard to Denney Road pedestrian and bicycle connection, or Crescent Connection, is part of a larger vision for the City of Beaverton that will help implement the Beaverton Civic Plan and Transportation Plan. This project includes preliminary and final design for two segments of trail. Segment 1 includes approximately 620 feet of shared-use path along the north side of Denney Road from the existing Fanno Creek Trail Head to King Boulevard. Segment 2 includes approximately 2,700 feet of shared-use path along Beaverton Creek from Beaverton Transit Center to Cedar Hills Boulevard. The City of Beaverton will be performing on-street signing and stripping to connect the two segments.</p> <p><b>Market Street NE/Swegle Road NE Corridor Improvements; Salem, Oregon</b>—Lead Civil Engineer - Otak is developing plans for widening and realigning Market Street and Swegle Road in Salem. Improvements will include widening the current roadways to arterial standards and realigning two intersections to create a single signalized intersection, directing traffic away from Swegle Elementary School. Work at the school will include creating a circulation area for buses and student drop off areas using the remnant right-of-way. Additionally, Otak will be developing two new culvert crossings including structural design for headwall extension. Otak is providing public involvement, including an involved program of public and stakeholder outreach, property owner meetings, and a focused stakeholder committee to address school and neighborhood issues.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Project/WOC Manager, Roadway Designer</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p>	
<p><b>Discipline:</b> Civil Engineering</p>	
<p><b>Education:</b> BS, Environmental Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 15</p> <p>Sheryl is a project manager and civil engineer with Otak. She has been working on civil engineering projects since 1997, specializing in highway, arterial, and collector street projects. Her experience ranges from new construction, realignment, and retrofits, including associated drainage and utilities. Sheryl is accomplished at facilitating permitting and acts as a liaison with regulatory agencies, stakeholders, and the general public.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Ron Jee, PE Senior Project Manager/Bridge Engineer</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Nehalem River (Miami-Foley Road) Bridge (Lommen Bridge); Tillamook County, Oregon</b>—Project/WOC Manager - Ron is providing project management for the replacement of Lommen Bridge for Tillamook County. The multidiscipline team performed site investigation, alternative design analysis, preliminary and final design, and development of plans, specifications, and estimates along with supportive studies. Project challenges include the flood and debris risk associated with the crossing, and coastal factors and environmental compliance issues. Construction is scheduled for 2015-2017.</p> <p><b>Grave Creek (Beecher Road) Bridge Assessment/Repair Design; Josephine County, Oregon</b>—Project/WOC Manager/Bridge Engineer - Ron was project manager and one of the bridge engineers responsible for inspecting and designing an emergency repair and replacement bridge for this deteriorated 100-foot single-span timber pony truss. The bridge provided the only access to about 12 residents, and ODOT was going to recommend closure without repairs. Traffic control including load restrictions was immediately recommended by Otak. Repairs were detailed for County forces to perform the construction. Both design and repairs were performed punctually and avoided bridge closure. Otak developed a planning-level project scoping report and PS&amp;E for the bridge replacement.</p> <p><b>I-5: Wilsonville Road Interchange; Clackamas County, Oregon</b>—Project/WOC Manager - Ron was the project manager of the Otak team that completed the environmental assessment, preliminary design, final design, and construction documents for this ODOT/City of Wilsonville project. The purpose of the project is to improve the safety and increase the capacity of the existing diamond interchange. Otak is the prime consultant responsible for project management, roadway and structural design, stormwater management and utilities coordination, urban design and landscape architecture, natural resource evaluation, and surveying. The Otak-managed team is also providing traffic engineering, and environmental documentation including NEPA determination and Biological Assessments. Construction was completed in Nov. 2012. Otak provided construction support and specialty inspection services.</p> <p><b>OR 293: Willowdale – Antelope (Phase 2); Wasco County, Oregon</b>—Project/WOC Manager/ Bridge Engineer - ODOT selected Otak to provide design engineering to replace two single-span timber bridges and the rehabilitation of a third bridge for deck and rail upgrades. The design of this OTIA project involved the completion of geotechnical, environmental, hydraulic analysis, permitting, alternative alignment and structure studies, and development of plans, specifications, and estimates. Environmental concerns included threatened and endangered fish species and wetlands. Construction was completed in 2005.</p> <p><b>Tillamook Streets Project; Tillamook, Oregon</b>—Project/Contract Manager - Otak performed engineering studies of alternate log truck routes, developed construction plans, specifications and estimate for the selected route, and performed construction management/inspection during construction. The project sought to relieve congestion on the Oregon Coast Highway and enhance safety for motorists and pedestrians by reducing log truck traffic downtown. The design included existing road reconstruction, new road construction, sidewalks, storm drainage, and traffic signing and striping. Ron led the work sessions with the City, County, and ODOT, and presented project information at public meetings. Construction was completed in 2003.</p> <p><b>US 395: McKay Creek to Silvies Slough Design-Build Bundle 414; Oregon</b>—Design Quality Manager - Otak was the lead consulting engineer for this \$40 million design-build project in eastern Oregon that involved replacement of seven bridges and repair of one bridge along an Oregon Highway corridor spanning from Pendleton to Burns. All bridge replacements were constructed in stages to accommodate traffic or as rapid construction with offsite detour. Otak led a multidisciplinary team to develop plans, specification and provided quality assurance program during construction.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Project/WOC Manager, QA/QC, Bridge Design</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p> <p><b>Discipline:</b> Civil Engineering</p>	
<p><b>Education:</b> BS, Civil Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 35</p> <p>Ron specializes in managing, engineering and designing projects for transportation facilities, especially ones that are multi-discipline with a high level of coordination. He has extensive experience in designing bridges of prestressed concrete, post-tensioned concrete, reinforced concrete, timber, and steel. He has designed more than 60 bridges, and been project manager for more than 150 projects in Oregon. Ron has more than 20 years of experience managing ODOT on-call contracts. He co-authored Otak's QA/QC plan and has performed QC reviews for over 100 bridge projects.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Doug Sarkkinen, PE, SE Principal/Senior Project Manager</p>	<p><b>Experience on relevant projects:</b></p> <p><b>City of Salem Consultant of Record; Salem, Oregon</b>—Project Manager - The City of Salem selected Otak for multiple professional services on a continuing services basis including Bridge Engineering and Structural Engineering. Bridge engineering services may include project development, analysis, preliminary and/or final design, and preparation of bid documents for projects such as a new bridge construction, bridge replacement, bridge rehabilitation, bridge repair, bridge scour repair, and bridge protection projects. Structural engineering services may include project development, analysis, preliminary design, and preparation of bid documents for seismic retrofit projects, bridge repairs, retaining walls, footings, and other structures.</p> <p><b>Replacement of Dethman Ridge Drive Bridge at Odell Creek and Ehrck Hill Drive Bridge at Odell Creek; Hood River, Oregon</b>—QA/QC - Otak is providing preliminary and construction engineering services for the replacement of the Dethman Ridge Drive Bridge over Odell Creek and the Ehrck Hill Drive Bridge over Odell Creek in Hood River County. Services for this project include on-site investigations and surveys, foundation investigations, hydraulic and scour analysis, environmental documentation, preliminary and final design, construction management/inspection.</p> <p><b>NW Bucklin Hill Road Bridge Replacement and Estuary Enhancement; Kitsap County, Washington</b>—Bridge Design Manager - The scope of work includes replacing two existing 72-inch culverts with a 240-foot bridge, widening the road to five lanes between Blaine Avenue and Mickelberry Road, traffic signals, roadway and pedestrian lighting, storm drainage improvements and amenities for pedestrians and bicyclists. The grade of the road will be revised to provide clearance under the new bridge and to better fit the adjacent properties and roadway connections. The bridge consists of precast voided slabs with a cast-in-place deck and the slabs will be specially constructed with ducts to allow longitudinal post-tensioning after the deck slabs have cured. The longitudinal post-tensioning will allow the bridge to function as a continuous structure, and keeps the structural depth to a minimum to allow clearance above wave and storm events on Puget Sound.</p> <p><b>Coughlin Road Bridge Deck Replacement; Lewis County, Washington</b>—Project Manager - Otak is designing a new bridge deck with fabricated steel decking for Lewis County. This pony truss bridge over the South Fork of the Newaukum River was built in 1922 and then rehabilitated in 1966.</p> <p><b>Nehalem River (Miami-Foley Road) Bridge (Lommen Bridge); Tillamook County, Oregon</b> —Bridge Design Manager - Tillamook County selected Otak through the ODOT mini-RFP/interview process to provide engineering services for the replacement of Lommen Bridge. The project’s primary challenges include the flood and debris risk associated with the crossing, as well as coastal factors and environmental compliance issues. The Otak team is preparing an alternatives analysis, design acceptance package, and final design plans, specifications, and estimate for a longer, wider bridge with a scour and debris resistant deep foundation system. Otak’s services include project management, bridge and roadway design, hydraulics analysis/river modeling, stormwater analysis, and construction management/inspection. Design work is scheduled for 2011-2013 and construction for 2015-2017.</p> <p><b>Highlands to Landing Pedestrian Connection; Renton, Washington</b>—Structural Lead - This project will provide a continuous barrier-free pedestrian connection between the Renton Highlands neighborhood and urban center and the recently developed Landing (a shopping/business center), as well as Gene Coulon Memorial Beach Park. Included in the pedestrian connection is the widening of an existing three span concrete box girder bridge. The widening entails removing the existing rail and parapet and extension of the deck with a new barrier. Extensive coordination was required with the WSDOT Bridge and Structures office along with a new load rating performed.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Structural Engineering Lead</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p> <p><b>Discipline:</b> Structural Engineering</p>	
<p><b>Education:</b></p> <p>MS, Civil Engineering BS, Civil Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 26+</p> <p>Doug is a Principal at Otak with over 26 years of experience in structural engineering. He has significant experience with concrete structures and bridges, and is a highly sought after forensic and expert witness. Throughout his career, Doug has authored 16 papers presented at various technical conferences for organizations including the American Concrete Institute, the American Society of Civil Engineers, and the Post-Tensioning Institute.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Gary Alfson, PE Senior Project Manager</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Main Street Reconstruction; Tigard, Oregon</b>—Project/WOC Manager - The Main Street Reconstruction project is an ODOT-funded Metro Green Street project. The scope of the project is to improve the aesthetics and multi-modal accessibility of 1400 lineal feet of Main Street from 99W to the RR tracks by widening sidewalks, slowing through traffic, and installing landscape features. The landscape features also were to improve water quality by treating the runoff from the road as it is currently discharged directly into the creek. The roadway could not be widened as many of the buildings abutted the back of the sidewalks. Sidewalks were widened where possible and treatment strips were added to collect and treat runoff. Bulb outs were added to driveways and street intersections to slow traffic and provide additional landscaping space. The pavement was reduced to a minimum 24 feet wide and parking maximized with parallel and angled stalls per the downtown business owners request. The project has completed the 90% design level PS&amp;E and right of way is wrapping up. Construction is scheduled for 2013.</p> <p><b>Salamo Road Resurfacing; West Linn, Oregon</b>—Project/WOC Manager - The Salamo Road Resurfacing was an ARRA funded project. The project limits were from Barrington Heights to Rosemont Road and was on a very short timeline. The project was completed on time and under budget. The project included the resurfacing of 1.4 miles of Salamo Road, a two lane arterial road with a median and bike lanes. The failed portions of the pavement were milled out and the remaining street overlaid for structural capacity. Storm drainage treatment was added to the existing facilities to provide the required treatment according to the funding requirement. Construction was completed in 2010.</p> <p><b>Padden Parkway Widening; Clark County, Washington</b>—Project/Contract Manager - The Padden Parkway project was a state/local funded project for Clark County. The project limits were 1.3 miles from 94<sup>th</sup> Avenue to Andresen Road and included widening a two to four lane major arterial roadway to a continuous four lane facility. The improvements consisted of matching in to the existing I-205 overpass and on/off ramps. A new, two way, bike and pedestrian path was added to the roadway the full length of the project including an I-205 overpass. Construction was completed in 2007.</p> <p><b>Pavement Rehabilitation Program; Tualatin, Oregon</b>—Project Manager/Engineer - The Tualatin Pavement Rehabilitation Program includes three years of pavement resurfacing projects for the City. The project involved prioritizing and selection of projects for the City’s \$500,000 to \$800,000 annual pavement management system. The scope of work includes preliminary cost estimating from site visits and recommendations. Construction plans are prepared including spot reconstruction, overlay thicknesses, striping, traffic control, and construction management. Construction was completed in 2010, 2011 and 2012.</p> <p><b>Lower Boones Ferry Road; Washington County, Oregon</b>—Project/Contract Manager - The Lower Boones Ferry Road project was an MSTIP project for Washington County. The project included reconstruction of the existing roadway to full Major Collector standards. The existing road was in poor condition and needed substantial upgrades to accommodate the Park and Ride Facility and the Bridgeport Mall developments. The improvements consisted of pavement widening, curbs, sidewalk, and storm drainage facilities. Construction was completed in 2006.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Project/WOC Manager, Roadway Design Lead, Utility Coordinator</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p> <p><b>Discipline:</b> Civil Engineering</p>	
<p><b>Education:</b> BS, Civil Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 30+</p> <p>Gary is a senior project manager at Otak with over 30 years of professional experience in both the public and private sectors. He has extensive experience in the administration, design, and construction of public improvement projects, institutional facilities, and private site development. Gary has worked with several public agencies throughout Oregon and Southwest Washington in the areas of roadway rehabilitation, alignment, and design analysis, and he is familiar with the land use/permitting process required for the construction of private and public improvement projects.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Jack Carlson, PLS Principal/Director of Surveying</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Interstate 5, Iowa Street Viaduct; Portland, Oregon</b> Project/WOC Manager—This project is located along Interstate Highway No. 5 at the north end of the Terwilliger curves. ODOT selected Otak to perform all the surveying and mapping work required for the design of a proposed 10-lane replacement bridge. The project involved the establishment of horizontal and vertical project control, resolving the rights-of-way of the freeway and adjacent city streets, and topographic surveying and digital terrain modeling of the anticipated work area. ODOT furnished photogrammetric mapping data that was merged with the ground measured survey in order to build a complete map and terrain model of the area.</p> <p><b>Upper Perry Arch Bridge; Union County, Oregon</b> Survey Manager/Project Surveyor—Work elements included horizontal and vertical project control networks, detailed topographic survey, mapping and DTM, legal descriptions, and exhibits.</p> <p><b>Hwy. 45 Elk Creek Bridge; Douglas County, Oregon</b> Project Manager/Project Surveyor—Work elements of this bridge replacement project included monument recovery, center line and right-of-way retracement, property boundary determinations, preparation of right-of-way base map, mapping and modeling data collection, computed aided mapping and modeling, sign inventory, horizontal control, recovery and retracement survey, right-of-way mapping, legal descriptions and exhibits, and GPS (terrestrial and vertical project control survey network).</p> <p><b>Interstate Hwy. 84 Snake River Bridges; Malheur County, Oregon</b> Project Manager/Project Surveyor—Work elements of this bridge replacement project included monument recovery, center line and right-of-way retracement, property boundary determinations, preparation of right-of-way base map, mapping and modeling data collection, computed aided mapping and modeling, sign inventory, horizontal control, recovery and retracement survey, right-of-way mapping, legal descriptions and exhibits, and GPS (terrestrial and vertical project control survey network).</p> <p><b>Highway 26 – Vollmer and Johnson Creek Bridges; Oregon</b> Project Manager—This project is located along Highway 26 near the coast (approximately mile point 3) and entailed a bridge replacement for two bridges over two creeks separated by approximately one-mile and involved right-of-way resolution and terrain mapping.</p> <p><b>Highway 99 Newberg-Dundee Transportation Improvement Project – Surveying; Newberg, Oregon</b> Project Manager—This large project was split into segments A thru H and our area of responsibility, segments G and H, crossed both Yamhill and Washington Counties and extended from the east side of Newberg, easterly about three miles to the end of the overall project site. The project primarily involved right-of-way resolution along highway 99W with some limited topographic mapping in select areas. The highway had been moved several times over the years resulting in five separate center lines that had to be resolved. Various portions of the right-of-way were related to different center lines throughout the site making the resolution very complicated. Our filed record of survey included 43 sheets at 1”=200’ scale (largest ROS we have ever recorded).</p> <p><b>I-5: Wilsonville Road Interchange; Clackamas County, Oregon</b> Survey Manager—The purpose of this ODOT-led project was to improve the safety and increase the capacity of the existing interchange. Otak was the prime consultant responsible for project management, roadway and structural design, stormwater management and utilities coordination, urban design and landscape architecture, natural resource evaluation, and surveying.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Survey Lead, Project/WOC Manager</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y <b>Discipline:</b> Licensed Surveyor</p>	
<p><b>Education:</b> BS, Civil Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 36+</p> <p>Jack is Principal-in-Charge of Otak’s Surveying and Mapping Group. He has been a registered professional surveyor since 1983. The combination of his strong surveying and engineering backgrounds has proven invaluable on many projects. When necessary, he is able to make engineering-related decisions onsite, enabling the surveying effort to be greatly streamlined. Jack is recognized for his ability to coordinate diverse project teams, as well as facilitate economies of effort, schedule, and budget.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> George Machan, PE Senior Associate Engineer</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Interstate I-5/Iowa Street Viaducts Replacement, Geotechnical Review; Portland, Oregon</b>—Senior Geotechnical Engineer - George provided fast-track support to ODOT for completing design work to replace the I-5 viaduct structure that spans a major ravine in landslide terrain near downtown Portland. Provided senior geotechnical review of two upslope tieback retaining walls and bridge foundation designs prepared by the Region 1 Geotechnical Group. Developed final designs and construction documents for a downslope tieback retaining wall and four MSE abutment walls, and provided technical input during the ongoing construction phase.</p> <p><b>Cornelius Pass Road Slide; Multnomah County, Oregon</b>—Geotechnical Project Manager - This section of county road was damaged by slide activity during heavy storms. Emergency services included site reconnaissance and installation of instrumentation to evaluate the landslide. Remedial measures consisted of unloading the top of the landslide, installing French drains and two fans of horizontal drains, and buttresses in active slide areas. A system of collector pipes and culverts was designed to help stabilize the slopes and maintain drainage along the road corridor. The project was completed for Multnomah County Local Agency for ODOT.</p> <p><b>Highway 20 Realignment, Pioneer Mountain to Eddyville; Eddyville, Oregon</b>—Senior Geotechnical Engineer - George provided peer review and investigation services as ODOT’s representative for a proposed 7-mile-long design/build alignment project through the coast range that includes large embankments on weak soils and ancient landslide terrain. Services included several geotechnical investigation and instrumentation programs that proved crucial to the proper and comprehensive analysis for embankment and landslide mitigation designs.</p> <p><b>Little North Fork Santiam River Road Slide; Marion County, Oregon</b>—Senior Geotechnical Engineer - George performed a geotechnical investigation for a localized roadway slide, at the toe of a 2-mile long ancient slide. Evaluated mitigation options and prepared cost estimates. French drains and horizontal drains were installed to locally improve roadway stability, and damaged culverts were replaced.</p> <p><b>Newberg–Dundee Bypass; Newberg, Oregon</b>—Geotechnical Project Manager for the EIS Phase of the proposed bypass alignment - Services included geologic reconnaissance and mapping to identify geologic hazards (landslides, compressible soils, and high groundwater), and EIS-level explorations to evaluate conditions at key locations. Design challenges included segments that crossed ancient landslides and an area where a deep through-cut would extend below the groundwater table. Summarized the surface and subsurface information in a geotechnical data report and in the technical report for the draft EIS.</p>
<p><b>Name of firm (only if sub):</b> Cornforth Consultants, Inc.</p>	
<p><b>Role on this project:</b> Senior Geotechnical Engineer</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y <b>Discipline:</b> Civil Engineering, Geotechnical Engineering</p>	
<p><b>Education:</b> MS Purdue University; BS University of Connecticut</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 37</p> <p>George has over 37 years of experience in geotechnical engineering in the state of Oregon, including 12 years at ODOT as the statewide Geotechnical Engineer and Project Manager. Mr. Machan has provided geotechnical direction on over 100 ODOT projects.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Kevin Timmins, PE Water Resources Manager</p>	<p><b>Experience on relevant projects:</b></p> <p><b>East Lents Floodplain Restoration Project; Portland, Oregon</b> Project/Contract Manager—Kevin is managing a multi-disciplinary team to design, permit, and support construction of a multi-million dollar floodplain restoration project on Johnson Creek. The project includes 5,000 linear feet of streambank restoration, excavation of 50,000 cubic yards of floodplain soils, formation of earthen berms, removal of 3,000 feet of existing roadway and three associated bridges, nine low impact stormwater management facilities to treat runoff to existing storm outfalls, 1,200 feet of new roadway and accompanying utilities, 2,000 feet of new sidewalks, 3,000 feet of multi-use trails including a new bridge crossing of the restored Johnson Creek, and a small parking lot for public access to this newly created 52 acre open space area and the adjacent Springwater Trail.</p> <p><b>Nehalem River (Miami-Foley Road) Bridge (Lommen Bridge); Tillamook County, Oregon</b> Hydraulic Task Lead—Kevin is leading the hydraulic design tasks for the replacement of Lommen Bridge over the Nehalem River in Tillamook County. Hydraulic design tasks include bridge and floodplain hydraulics, bridge scour, lateral migration, debris management, road drainage, stormwater management, and erosion control. The existing bridge has a long history of flooding, debris loading, and scour issues which present significant challenges for the design of the new crossing. Other challenging site constraints include; geometry, right-of-way, and environmental compliance.</p> <p><b>US395: McKay Creek to Silvies Slough Design-Build Bundle 414; Oregon</b> Hydraulic Task Lead—Kevin was responsible for managing the hydraulic design tasks for six bridges funded under the Oregon Transportation Investment Act (OTIA) III program. The hydraulic design tasks included bridge hydraulics, bridge scour, roadway drainage, stormwater management, and erosion control.</p> <p><b>I-84 Reinforced Concrete Box Culvert Retrofits; Baker County, Oregon</b> Lead Hydraulic Engineer—Otak provided engineering services to develop final design and bidding documents for structural repairs to Reinforced Concrete Box Culverts (RCBC) in deep fill on I-84. The project included structural and fish passage retrofit on 5 RCBC's, located beneath I-84 between Pleasant Valley and the Weatherby Rest Area. Repairs included installation of a constructed streambed using streambed gravel and bed retention sills to improve fish passage through three of the culverts.</p> <p><b>US 20: Pioneer Mountain to Eddyville Permit Mitigation; Oregon</b> Project/Contract Manager—The Oregon Department of Transportation selected Otak to design four mitigation sites to offset new project-related environmental impacts. Responsibilities include hydrologic/hydraulic analysis, design and preparation of construction documents for five mitigation sites that consist of grading, seeding, planting, and erosion and sediment control plans.</p> <p><b>ODOT Statewide On-Call Stormwater Engineering and Environmental Services; Oregon</b> Project Manager—Otak is one of four firms with an on-call contract to provide a broad range of stormwater engineering and environmental services for projects throughout Oregon. Work Orders under this contract are expected to assist with underground injection controls, stormwater monitoring, and stormwater environmental assessment services.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on this project:</b> Project/WOC Manager, Water Resources Lead</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y <b>Discipline:</b> Civil Engineering</p>	
<p><b>Education:</b> MS, Environmental Engineering; BS, Environmental Engineering</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 13</p> <p>Kevin has 13 years of engineering experience working with, and managing a multi-disciplinary design team for public agency projects in Oregon and Washington. He has spent his entire career working in surface water systems, including streams, wetlands, and urban drainage systems. Kevin has a comprehensive understanding of the planning, design, permitting, and construction process for projects that have to strike a balance between natural resource areas and the built environment. Whether for flood management, stormwater quality, restoration, or compliance with various regulatory requirements, he works with project stakeholders to develop integrated solutions that achieve multiple benefits.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Stuart Myers, Senior Environmental Scientist</p>	<p><b>Experience on relevant projects:</b></p> <p><b>ODOT Statewide Culvert Management Program, Oregon Department of Transportation (ODOT), Statewide Oregon</b> - Project Manager - Assisted ODOT with development of a pilot program for replacement/improvement of ODOT's stream-road culvert crossings. Challenges included integration with ODOT's current practices and procedures for infrastructure maintenance, while modifying procedures and policies that have lead to neglect and disrepair. The project will lead to establishment of a comprehensive asset management program designed to facilitate more timely and economic infrastructure maintenance, while enhancing Oregon's natural environment through improvement of watershed processes.</p> <p><b>172<sup>nd</sup>/190<sup>th</sup> Corridor Plan, ODOT, Clackamas County, Oregon - Environmental Manager</b> - Environmental manager for preliminary planning and roadway alternatives development and refinement for the future improvement of the SE 172<sup>nd</sup> Avenue and SE 190<sup>th</sup> Avenue corridors in northern Clackamas County. The project involved environmental baseline studies for various disciplines and selection of a preferred roadway improvement alternative based on land use and environmental screening. Managed environmental specialty firms for preparation of a comprehensive environmental baseline report and implementation plan. The project was developed following Federal Highway Administration (FHWA) NEPA requirements.</p> <p><b>Interstate 5 (I-5) Willamette River Bridge Replacement, ODOT, Eugene/Springfield, Oregon</b> - Environmental Manager, Managed the environmental regulatory permitting and approval process for the replacement of the I-5 crossing of the Willamette River in the Eugene/Springfield area. This is the largest project delivered by ODOT under the OTIA III Bridge Program, and the first ODOT project delivered under the Construction Manager General Contractor (CMGC) process. The project involved an extensive suite of federal, state, and local environmental compliance and permitting requirements. Worked daily with project design and construction staff to deliver the project under an extremely accelerated schedule. Despite the scope of this large, complex project, design and permitting efforts were completed within one year. Currently managing fish salvage, hydro-acoustic monitoring, and permit modification requests for the construction phase of the project.</p> <p><b>US 395: McKay Creek-Silvies Slough Design-Build, Bundle 414, ODOT, Eastern Oregon</b> - Environmental Project Manager, Managed environmental regulatory compliance, environmental monitoring, and fish salvage activities during final design and construction of eight bridge replacements for this design-build construction contract. The bridge replacements were located in three counties and eight watersheds in eastern Oregon. Also, developed and implemented an environmental training program for construction staff, and managed post-construction site restoration and mitigation activities.</p>
<p><b>Name of firm (only if sub):</b> Mason, Bruce &amp; Girard</p>	
<p><b>Role on this project:</b> Environmental Services Lead</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p>	
<p><b>Discipline:</b> Environmental</p> <ul style="list-style-type: none"> <li>- ODOT Biological Assessment Certificate of Qualification, 2005/2010</li> <li>- ODOT OTIA III Bridge Program Delivery Training, Certified Technical Lead, 2005</li> </ul>	
<p><b>Education:</b> M.S., Geography; B.S., Environmental Studies</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 15</p> <p>Stuart has extensive knowledge of federal, state, and local environmental regulations as well as compliance and mitigation requirements for ESA, wetland protection, fish passage, and NEPA. Stuart has managed the environmental documentation and permitting process for more than 30 ODOT and Local Agency transportation projects throughout Oregon. He is a member of Oregon's Statewide Fish Passage Task Force which advises the Oregon Department of Fish and Wildlife and the Fish and Wildlife Commission on matters related to fish passage.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Leslie Finnigan, SR/WA – Western Regional Manager</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Columbia River Crossing – Consulting Services, ODOT</b> – Universal has been involved in the Columbia River Crossing for five years providing early right of way involvement at public meetings, preparing cost estimates and providing knowledge of the right of way process to the CRC. They are currently involved with the project providing a staff member to assist in the early stages of the project.</p> <p><b>Oregon 213 –I205, Redland Road – City of Oregon City</b> – Universal was responsible for all phases of the right of way process for this project. There were 4 properties involved for this high profile project. Leslie provided oversight, quality control and assisted the attorneys for the City as needed. There were no condemnations.</p> <p><b>Munger Creek Bridge – ODOT/Josephine County</b> – Universal provided right of way services for the replacement and widening of this bridge on Munger Creek. There was one relocation involved that required extra assistance because of unusual circumstances. The relocation was completed and the project successfully certified.</p> <p><b>Pioneer Mountain –Eddyville – ODOT</b> - Universal acquired the right of way for this project in rural Lincoln County. There were 14 parcels that required right of way. Universal handled the appraisal and acquisition for this project.</p> <p><b>OR 204 – Elgin City – ODOT</b> – Universal was the contractor for this project in Region 5. ODOT handled all of the appraisals but contracted for the right of way acquisition. Leslie provided the project management for this 17 parcel project.</p> <p><b>OR 99 (Halsey) to I-5 - ODOT</b> – Universal provided appraisal and acquisition services for this widening project in Halsey, OR. The project had 31 parcels from a rural residential area with some commercial properties just at the city limits of Halsey</p> <p><b>SE 19th to SE 32nd (US 101) – ODOT</b> – Universal provided appraisal and acquisition services along US 101 in Lincoln City. There were seven parcels along this commercially developed stretch of the coast highway.</p> <p><b>Salem River Crossing – ODOT/City of Salem</b> – Universal provide cost estimating for the various alternatives on this project for the Environmental Impact Statement. There were eight alternatives that had to be considered.</p> <p><b>Portland-Milwaukie Light Rail – TriMet</b> – This project involves complex right of way and relocation services for the new light rail line from Portland to Milwaukie. Leslie has been providing oversight on the project including assisting staff, reviewing completed files (quality control) and monitoring schedule and budget.</p>
<p><b>Name of firm (only if sub):</b> Universal Field Services</p>	
<p><b>Role on this project:</b> Right of Way Services Lead</p>	
<p><b>Active registration in Oregon (Y/N):</b> Y</p>	
<p><b>Discipline:</b> Principal Real Estate Broker</p>	
<p><b>Education:</b> 4 Years Western Oregon University</p>	
<p><b>Years of experience in discipline/role proposed for this project:</b> 26</p> <p>Leslie has over 26 years of experience in the right of way field. She currently is involved in all phases of the land acquisition and relocation process in a management capacity. Leslie is a former ODOT Right of Way Project Manager and Senior Agent. She also has local public agency experience as a project manager for Washington County Land Use and Transportation.</p>	

## KEY STAFF RESUMES

<p><b>Name &amp; Title:</b> Stacy Thomas, Senior Project Manager</p>	<p><b>Experience on relevant projects:</b></p> <p><b>Oregon Passenger Rail Plan – ODOT Major Project Branch</b>            Stacy is managing a comprehensive public involvement and communications program for this 125-mile corridor planning effort focused on selecting a passenger rail route between Portland and Eugene, as well as a variety of other system improvements. JLA is leading all aspects of the public involvement program, including formation and facilitation of a 50-member Corridor Forum, hosting four rounds of open houses, designing an interactive online version of the open house, creating and producing all communications and information materials in-house, producing project videos, managing the project website (OregonPassengerRail.org), and tracking and managing all public comments.</p> <p><b>I-5 Woodburn Interchange and Transit Facility – ODOT Region 2</b>            Stacy is leading the public involvement and information campaign to reconstruct the interchange at Interstate 5 and Oregon 219/214, in the City of Woodburn. Stacy is working with stakeholders and interested parties to identify and minimize construction impacts, provide current information and opportunities to stay involved and to provide input. JLA is managing the project website (WoodburnInterchange.com) and facilitated community design aesthetics panel. A project overview video was recently produced and being hosted on the project web site, and used by local officials and businesses to inform the public about impacts and business access during construction.</p> <p><b>TV Highway Corridor Plan – ODOT Region 1</b>            Stacy is leading the public involvement program for this TGM-funded planning project within the cities of Hillsboro and Beaverton and Washington County. The project is addressing needed transportation improvements for an 8.5-mile stretch of highway. Stacy facilitated meetings of the Community Advisory Committee and the Policy Group. JLA produced a Title VI report and did targeted outreach to engage the project area’s diverse populations, providing translated materials, doing special weekend outreach events and door-to-door canvassing. JLA is managing the project website (www.TVHighway.org) and designed and produced all public informational materials.</p> <p><b>Other notable projects include:</b></p> <ul style="list-style-type: none"> <li>• US 26: Brookwood Parkway Interchange Area Management Plan – ODOT Region 1</li> <li>• US 26: Dennis Edwards Tunnel – ODOT Regions 1 &amp; 2</li> <li>• I-5 Bridges Vertical Clearance Project - ODOT Region 2</li> <li>• I-405 Pavement Preservation – ODOT Region 1</li> </ul>
<p><b>Name of firm (only if sub):</b> JLA Public Involvement Inc.</p>	
<p><b>Role on this project:</b> Public Involvement Lead</p>	
<p><b>Active registration in Oregon (Y/N):</b> n/a  <b>Discipline:</b></p>	
<p><b>Education:</b> J.D. (Law), University of San Diego; B.A. University of Oregon</p>	
<p><b>Years of experience in discipline/role proposed for this project: 10</b></p> <p>Stacy Thomas, Senior Project Manager of JLA Public Involvement, Inc., is widely recognized throughout the Portland region for her background and expertise in public involvement strategy development and project management – with particular expertise in the transportation field.</p> <p>Stacy joined JLA in 2008 after serving as the Senior Community Affairs Coordinator for the Oregon Department of Transportation (ODOT), Region 1 in Portland. During her nearly six years with the agency, Stacy was responsible for strategic communications, public outreach, and agency coordination for all of ODOT's projects in Multnomah, Columbia, and Hood River counties. Her familiarity with ODOT's policies, projects and staff is immensely helpful in JLA's transportation work.</p>	

**Reference Questionnaire Form for PE/Design Services; RFP # 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>I-5: Wilsonville Road Interchange</b>		Proposing Firm: <b>Otak, Inc.</b>	
Location: <b>Wilsonville, Oregon</b>		Consultant's PM: <b>Ronald Jee, PE</b>	
Project Type: <b>PE for Grading, Drainage, Structures, Paving, Signing, Illumination, Signals, and Roadside Development</b>		Email: <b>ron.jee@otak.com</b> Ph: <b>(503) 699-2433</b>	
<p>The purpose of this federally funded project is to improve the safety, increase the capacity of the existing diamond interchange, and provide an aesthetic gateway to the City of Wilsonville.</p> <p>Otak completed the revised environmental assessment, preliminary design, final design, and construction documents for this ODOT project. In addition, prior to this design contract, through a PA for planning-type assignments, Otak performed the project scoping of this interchange work.</p> <p>This significant and visible project on the I-5 corridor required the team to address a number of challenges, including lengthening and widening each of the ramps under traffic, resolving height restrictions where Wilsonville Road crosses under I-5, geometrically and aesthetically enhancing pedestrian and bike facilities, meeting an aggressive schedule due to funding constraints, coordinating the design to adjacent public and private developments, facilitating intergovernmental interaction, and designing complex construction staging within this congested urban corridor. The project included a significant soil nail wall, soldier pile walls, and a drilled shaft wall to avoid impacts to the existing bridges and vibration-sensitive buildings and minimize impacts to adjacent business properties. Stormwater management facilities were strategically located with the existing ODOT maintenance yard to take advantage of existing drainage patterns and reduce property impacts.</p> <p>Otak is the prime consultant and performed 59% of the PE work including project management, roadway and structural design, stormwater management, utilities coordination, urban design and landscape architecture, natural resource evaluation, and surveying. The Otak subconsultants provided traffic engineering, geotechnical investigations, public involvement, ramp design, and environmental documentation including NEPA determination and Biological Assessments.</p> <p>The overall design effort was the result of a successful “partnering” approach to the issues with ODOT and the City of Wilsonville. All issues were resolved in a timely manner. The Otak team, including subconsultants, are located near the Portland area, which made meetings with ODOT and the City efficient in travel time and responsiveness. The design phase met the schedule for each of the milestones and was completed under budget.</p> <p>The construction for this project is nearly complete. Otak is also providing construction support and inspection services.</p>		 	
Contract #: <b>26529</b>	WOC #(if applic.): <b>1</b>	PE & Design Start (Mo/Yr): <b>12/2008</b>	PE & Design Complete (Mo/Yr): <b>10/2010</b>
Client's Construction Budget for the Project: <b>\$20 million</b>			
Consultant Services Contract/WOC Amount (including as amended): <b>\$2.59 million (PE)</b>			
<b>(check one)</b>			
This is a: <input checked="" type="checkbox"/> <b>primary reference; or</b> <input type="checkbox"/> <b>alternate reference (must be allowed for in the RFP)</b>			
<b>B. Client Information</b>			
Client Name: <b>ODOT/City of Wilsonville</b>			
Client's PM: <b>Matt Freitag</b> Email: <b>matthew.d.freitag@odot.state.or.us</b> Ph #: <b>(503) 731-4851</b>		Alt client contact: <b>Steve Adams</b> Title: <b>Interim City Engineer; City of Wilsonville</b> Email: <b>adams@ci.wilsonville.or.us</b> Ph #: <b>(503) 682-4960</b>	

**C. Reference Responses**

**INSTRUCTIONS:** This is a reference questionnaire for the above named firm regarding consultant services provided on the above named project. **Do not submit reference questionnaire forms used on prior solicitations, as they may include different questions and scoring.** Please complete section C of this form by providing ratings for the criteria below using the Ratings Guidelines. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form directly to ODOT no later than [redacted]. Send to [redacted] at the following email address: [redacted] Phone number for questions: [redacted]**

<b>Ratings Guidelines:</b>		<b>Rating Scores</b> ↓
<p><b>Exceptional</b> <b>9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good</b> <b>7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory</b> <b>4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal</b> <b>1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory</b> <b>0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>		
<b>For the firm listed in Section A, please respond to the following:</b>		
1	Rate their efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate their responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did they coordinate/communicate with their staff, subcontractors, client staff, and other stakeholders?	
4	How well did they manage the budget? Did they demonstrate efforts to control costs and conduct tasks, meetings, travel, etc. in an efficient manner? Were the consultant services completed within the original budget (for each phase, if phased development)?	
5	How well did they perform on meeting schedule requirements? Were critical path items effectively managed and deliverable schedules met - specifically timing of environmental clearances, right of way acquisitions and design milestones (30%, advance plans, PS&E)?	
6	How well did they come up with creative or innovative solutions when presented with issues/problems?	
7	How well did they appear to apply sufficient staff resources with the appropriate skills and expertise?	
8	Rate the quality of the firm's draft and/or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
9	Rate how the firm performed in designing within the construction budget (or communicating and demonstrating early that the construction budget was insufficient)?	
10	How would you rate your overall experience with the firm?	

SCORE AVERAGE \_\_\_\_\_

**Note:** The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for PE/Design Services; RFP # 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>Fawcett Creek (S. Prairie Rd) Bridge</b>		Proposing Firm: <b>Otak, Inc.</b>	
Location: <b>Tillamook County, Oregon</b>		Consultant's PM: <b>Ian Machan, PE</b>	
Project Type: <b>Bridge Replacement, Stream Enhancement</b>		Email: <b>ian.machan@otak.com</b>	
		Ph: <b>(503) 699-4546</b>	
<p>This Emergency Relief (ER) funded project involved replacing a 12-foot diameter CMP culvert with a 120-foot-long single-span precast prestressed beam bridge supported on driven piles on reinforced concrete cap. In the winter of 2008, as Otak was working on the preliminary design to replace the culvert, a significant storm produced a high-flow event that washed the culvert and roadway approaches out. This prompted Tillamook County and ODOT to obtain Federal Emergency Relief funds to accelerate the design schedule to allow for construction in 2009— one full construction season ahead of schedule. The Otak team worked diligently to provide project management, topographic and right-of-way survey, geotechnical investigation, environmental documentation and permitting, hydraulic analysis, utility coordination, right-of-way acquisition, and bridge, roadway, traffic, and stormwater design. Design features for this bridge project included a driven steel pile foundation with buried riprap for scour protection, precast bulb I beams, and a cast-in-place concrete deck superstructure, drainage improvements, roadway approaches, asphalt paving, streambed enhancements, and utility coordination. Existing site streambed materials were reused as a cost savings measure. The new bridge was constructed in one stage with the road closed and a short detour in place for local traffic. The project also incorporated the installation of a waterline across the bridge, which was coordinated with a separate project in which both Tillamook County and Pleasant Valley Water District were key stakeholders.</p>			
<p>The design effort included 30% design plans and advance/final construction plans, special provisions, and cost estimates in ODOT-standard format. The project included a teamwork approach between all involved parties, including Tillamook County, ODOT, Otak, the affected utilities, and the surrounding community. The Otak team delivered the design four months ahead of schedule to allow construction completion one full year ahead of schedule. Even with the fast tracking of the project due to the culvert failure, the Otak team successfully accelerated the permitting and Right-of-Way (ROW) certification processes to keep the project on track. The Otak team was responsible for obtaining the USACE Section 404 and Oregon Removal/Fill permits for the new bridge and led the ESA consultation process and consulted with the USACE and NMFS to document the project's compliance with a SLOPES IV programmatic permit. The attention to detail provided throughout the design phase translated directly into a smooth construction project that fit within the established budget and did not experience costly change orders or overruns.</p>			
Contract #: <b>25316</b>	WOC #(if applic.): <b>4</b>	PE & Design Start (Mo/Yr): <b>07/2008</b>	PE & Design Complete (Mo/Yr): <b>04/2009</b>
Client's Construction Budget for the Project: <b>\$1 million</b>			
Consultant Services Contract/WOC Amount (including as amended): <b>\$300,000 (for PE-related Services)</b>			
<b>(check one)</b>			
<b>This is a:</b> <input checked="" type="checkbox"/> <b>primary reference;</b> or <input type="checkbox"/> <b>alternate reference (must be allowed for in the RFP)</b>			
<b>B. Client Information</b>			
Client Name: <b>Tillamook County Public Works</b>			
Client's PM: <b>Liane Welch</b>		Alt client contact: <b>George Urrey</b>	
Email: <b>lwelch@co.tillamook.or.us</b>		Title: <b>Tillamook County Senior Engineer</b>	
Ph #: <b>(503) 842-3419</b>		Email: <b>gurrey@co.tillamook.or.us</b>	
		Ph #: <b>(503) 842-3419</b>	

**C. Reference Responses**

**INSTRUCTIONS:** This is a reference questionnaire for the above named firm regarding consultant services provided on the above named project. **Do not submit reference questionnaire forms used on prior solicitations, as they may include different questions and scoring.** Please complete section C of this form by providing ratings for the criteria below using the Ratings Guidelines. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form directly to ODOT no later than [redacted]. Send to [redacted] at the following email address: [redacted] Phone number for questions: [redacted]**

<b>Ratings Guidelines:</b>		<b>Rating Scores</b> ↓
<p><b>Exceptional</b> <b>9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good</b> <b>7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory</b> <b>4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal</b> <b>1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory</b> <b>0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>		
<b>For the firm listed in Section A, please respond to the following:</b>		
1	Rate their efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate their responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did they coordinate/communicate with their staff, subcontractors, client staff, and other stakeholders?	
4	How well did they manage the budget? Did they demonstrate efforts to control costs and conduct tasks, meetings, travel, etc. in an efficient manner? Were the consultant services completed within the original budget (for each phase, if phased development)?	
5	How well did they perform on meeting schedule requirements? Were critical path items effectively managed and deliverable schedules met - specifically timing of environmental clearances, right of way acquisitions and design milestones (30%, advance plans, PS&E)?	
6	How well did they come up with creative or innovative solutions when presented with issues/problems?	
7	How well did they appear to apply sufficient staff resources with the appropriate skills and expertise?	
8	Rate the quality of the firm's draft and/or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
9	Rate how the firm performed in designing within the construction budget (or communicating and demonstrating early that the construction budget was insufficient)?	
10	How would you rate your overall experience with the firm?	

SCORE AVERAGE \_\_\_\_\_

**Note:** The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for PE/Design Services; RFP # 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>1<sup>st</sup> Street &amp; Main Avenue Sidewalks &amp; Bike Lanes</b>		Proposing Firm: <b>Otak, Inc.</b>	
Location: <b>Irrigon, Oregon</b>		Consultant's PM: <b>Ian Machan, PE</b>	
Project Type: <b>Street Widening and Enhancement, Utility Upgrades, and Stormwater Treatment</b>		Email: <b>ian.machan@otak.com</b>	
		Ph: <b>(503) 699-4546</b>	
<p>Otak provided design engineering services for this American Recovery and Reinvestment Act (ARRA) funded project that was approved contingent upon a 120-day obligation status, which translated into an extremely accelerated schedule. Otak was selected for this fast-track project based on past relevant experience with completing plans, specifications, and cost estimates (PS&amp;E) for federal-aid projects with very aggressive schedules. Otak delivered 100% PS&amp;E within three weeks from Notice-To-Proceed, on schedule, and within budget.</p> <p>This pedestrian-enhancement project involved construction of sidewalk facilities on a primary school route for children accessing the elementary and Jr./Sr. High Schools, as well as significant roadway improvements and upgrades to the City's storm and sanitary sewer and water systems. As part of this project, stormwater treatment facilities, street lighting, paver sidewalks, and street trees were designed to improve the look and functionality of Main Street, which is a key section of the City's downtown improvement plan. Otak also assisted the City with both utility relocation and right-of-way certifications, as required by the project's federal funding.</p>			
<p>A key issue for both ODOT and the City was to ensure the project budget was carefully monitored and that change orders and cost overruns were limited due to the available funding. The ARRA funds dedicated to this project were restricted, meaning the City would be required to pickup any costs above those originally budgeted for. The Otak team worked tirelessly with the City and ODOT over the course of the brief PS&amp;E delivery phase to hone project design, add and eliminate certain project elements to best align with the project budget, and obtain the necessary environmental and right-of-way certifications to allow construction to commence less than three months from the original Notice-To-Proceed date. Otak brought value to this project by continually protecting the best interests of the City of Irrigon and ensuring the project design could fit within the established budget. At the time of bid, the engineer's estimate was within 2% of the established budget and within 10% of the low bid contractor. Ultimately, as Otak continued work on this project in the CA/CEI phase, the project incurred several unanticipated subsurface conditions requiring the need to request additional ARRA funds to cover the overage. Otak assisted the City and ODOT in drafting these requests for funding and was successful in obtaining the entire value required to complete the project without the City having to contribute any funding other than their original match.</p>			
Contract #: <b>25316</b>	WOC #(if applic.): <b>5</b>	PE & Design Start (Mo/Yr): <b>05/2009</b>	PE & Design Complete (Mo/Yr): <b>06/2009</b>
Client's Construction Budget for the Project: <b>\$1.3 million</b>			
Consultant Services Contract/WOC Amount (including as amended): <b>\$94,000 (for PE-related services)</b>			
<b>(check one)</b>			
<b>This is a:</b> <input checked="" type="checkbox"/> <b>primary reference;</b> or <input type="checkbox"/> <b>alternate reference (must be allowed for in the RFP)</b>			
<b>B. Client Information</b>			
Client Name: <b>ODOT Region 5</b>			
Client's PM: <b>Doug Wright (currently PW Director @ Union County)</b>		Alt client contact: <b>Laura Slater</b>	
Email: <b>dwright@union-county.org</b>		Title: <b>ODOT Region 5 Local Agency Liaison (currently self-employed)</b>	
Ph #: <b>(541) 963-1016</b>		Email: <b>lauraslater@oregonwireless.net</b>	
		Ph #: <b>(541) 805-8510</b>	

**C. Reference Responses**

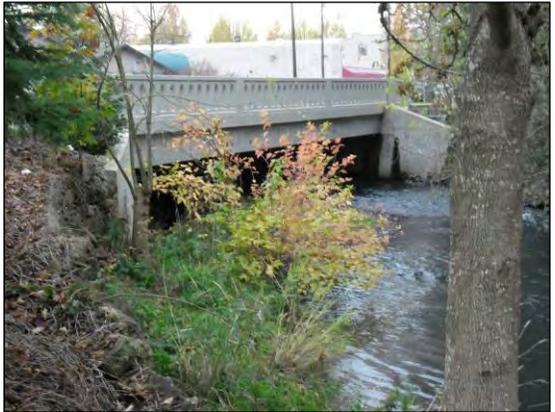
**INSTRUCTIONS:** This is a reference questionnaire for the above named firm regarding consultant services provided on the above named project. **Do not submit reference questionnaire forms used on prior solicitations, as they may include different questions and scoring.** Please complete section C of this form by providing ratings for the criteria below using the Ratings Guidelines. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form directly to ODOT no later than [redacted]. Send to [redacted] at the following email address: [redacted] Phone number for questions: [redacted]**

<b>Ratings Guidelines:</b>		<b>Rating Scores</b> ↓
<p><b>Exceptional</b> <b>9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good</b> <b>7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory</b> <b>4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal</b> <b>1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory</b> <b>0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>		
<b>For the firm listed in Section A, please respond to the following:</b>		
1	Rate their efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate their responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did they coordinate/communicate with their staff, subcontractors, client staff, and other stakeholders?	
4	How well did they manage the budget? Did they demonstrate efforts to control costs and conduct tasks, meetings, travel, etc. in an efficient manner? Were the consultant services completed within the original budget (for each phase, if phased development)?	
5	How well did they perform on meeting schedule requirements? Were critical path items effectively managed and deliverable schedules met - specifically timing of environmental clearances, right of way acquisitions and design milestones (30%, advance plans, PS&E)?	
6	How well did they come up with creative or innovative solutions when presented with issues/problems?	
7	How well did they appear to apply sufficient staff resources with the appropriate skills and expertise?	
8	Rate the quality of the firm's draft and/or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
9	Rate how the firm performed in designing within the construction budget (or communicating and demonstrating early that the construction budget was insufficient)?	
10	How would you rate your overall experience with the firm?	

SCORE AVERAGE \_\_\_\_\_

**Note:** The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for PE/Design Services; RFP # 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>Mill Creek (Capitol Street NE) Bridge</b>		Proposing Firm: <b>Otak, Inc.</b>	
Location: <b>Salem, Oregon</b>		Consultant's PM: <b>Ian Machan, PE</b>	
Project Type: <b>Bridge Replacement, Road Improvement</b>		Email: <b>ian.machan@otak.com</b>	
		Ph: <b>(503) 699-4546</b>	
<p>Otak completed the preliminary and final design of this complex federally funded project in downtown Salem, approximately three blocks from the State Capitol Building. The original bridge over Mill Creek on Capitol Street NE was a timber pier bridge that was deteriorating and load rated to allow school busses and emergency vehicles to cross only in the east-most lane. The City of Salem, in partnership with ODOT and FHWA, funded this project to replace the existing bridge with a 65-foot-long, 72-foot-wide single-span bridge consisting of precast concrete slabs on concrete abutments founded on drilled pile foundations. The small project footprint contained many difficult challenges, including extremely stringent vibration restrictions, the presence of hazardous materials in the subgrade, unique bridge construction methods including pre-drilled piles and permanent sheet pile scour walls, the installation of a new 18-inch water main, utility coordination and relocation, and a very tight construction schedule. Due to the location of this project, public involvement and coordination with the various interested agencies was of key importance.</p>			
<p>Due to the close proximity of the project to several homes and businesses constructed in the early 1900's, Otak integrated very tight vibration limits into the construction documents. The contractor was not allowed to use vibratory equipment and was required to monitor and record all vibrations within 50 feet of the project work zone throughout the project's duration.</p>			
<p>The project's location, located in the heart of downtown Salem and only blocks from the Capitol Building, state agency offices, and a nearby school, presented a staging challenge relative to the design and construction of the bridge. A two-stage approach where the bridge would have been constructed in halves would have been ideal to allow the heavy local traffic access across Mill Creek, but would have extended the construction duration to two years. Rather, the design team, with agreement from the City and ODOT, chose to construct the bridge in a single stage, closing the road to traffic over a single construction season. This timeframe allowed the contractor to utilize the full in-water work window and also caused the least disturbance to school traffic. With a partnership approach to project management and project coordination, Otak, the City of Salem, and ODOT were able to successfully complete this project within the allotted timeframe and budget. The quality of the design plans and specifications was apparent in construction as contract change orders and quantity overruns were minimized, leading to a successfully completed project.</p>			
Contract #: <b>25316</b>	WOC #(if applic.): <b>1</b>	PE & Design Start (Mo/Yr): <b>12/2007</b>	PE & Design Complete (Mo/Yr): <b>03/2010</b>
Client's Construction Budget for the Project: <b>\$2.5 million</b>			
Consultant Services Contract/WOC Amount (including as amended): <b>\$511,000</b>			
<b>(check one)</b>			
This is a: <input checked="" type="checkbox"/> <b>primary reference; or</b> <input type="checkbox"/> <b>alternate reference (must be allowed for in the RFP)</b>			
<b>B. Client Information</b>			
Client Name: <b>City of Salem</b>			
Client's PM: <b>John Echeverri</b>		Alt client contact: <b>JJ Johnson</b>	
Email: <b>jecheverri@cityofsalem.net</b>		Title: <b>ODOT Region 2 Local Agency Liaison</b>	
Ph #: <b>(503) 588-6211</b>		Email: <b>john.w.johnson@odot.state.or.us</b>	
		Ph #: <b>(503) 986-5834</b>	

**C. Reference Responses**

**INSTRUCTIONS:** This is a reference questionnaire for the above named firm regarding consultant services provided on the above named project. **Do not submit reference questionnaire forms used on prior solicitations, as they may include different questions and scoring.** Please complete section C of this form by providing ratings for the criteria below using the Ratings Guidelines. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form directly to ODOT no later than [redacted]. Send to [redacted] at the following email address: [redacted] Phone number for questions: [redacted]**

<b>Ratings Guidelines:</b>		<b>Rating Scores</b> ↓
<p><b>Exceptional 9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good 7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory 4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal 1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory 0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>		
<b>For the firm listed in Section A, please respond to the following:</b>		
1	Rate their efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate their responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm’s method of escalating unresolved issues.	
3	How well did they coordinate/communicate with their staff, subcontractors, client staff, and other stakeholders?	
4	How well did they manage the budget? Did they demonstrate efforts to control costs and conduct tasks, meetings, travel, etc. in an efficient manner? Were the consultant services completed within the original budget (for each phase, if phased development)?	
5	How well did they perform on meeting schedule requirements? Were critical path items effectively managed and deliverable schedules met - specifically timing of environmental clearances, right of way acquisitions and design milestones (30%, advance plans, PS&E)?	
6	How well did they come up with creative or innovative solutions when presented with issues/problems?	
7	How well did they appear to apply sufficient staff resources with the appropriate skills and expertise?	
8	Rate the quality of the firm’s draft and/or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
9	Rate how the firm performed in designing within the construction budget (or communicating and demonstrating early that the construction budget was insufficient)?	
10	How would you rate your overall experience with the firm?	

SCORE AVERAGE \_\_\_\_\_

**Note:** The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as “N/A”, total the scores provided and divide by the number of criteria responded to.

## APPENDIX B

Key Staff Resumes for CA/CEI SERVICES

References For CA/CEI SERVICES

## Key Staff Resumes for CA/CEI Services

Proposing Firm Name: Otak, Incorporated

RFP #: 25134

RFP Title: Full-Service A&E Price Agreements for ODOT and Local Agency Transportation Projects

<p><b>Name &amp; Title:</b> Ian Machan, PE Construction Project Manager/Associate</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ Professional Engineer (Oregon) – 81009PE</li> <li>▪ ODOT Inspection Certification # 43580</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified HMAC Inspector</li> <li>▪ ODOT Certified Drilled Shaft Inspector</li> </ul>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b> Price Agreement Manager / Work Order Contract Manager / Construction Project Manager</p>	
<p><b>Years of experience in proposed role:</b> 11</p> <p><b>Professional Summary:</b> Ian has extensive experience in construction project management for both Local Public Agency (LPA) and State/Federal construction projects. Ian leads Otak’s Construction Management and Inspection team and has managed over 25 ODOT/LPA construction projects, ranging in size from \$250,000 to \$35M. He has developed many important relationships within the ODOT and construction contractor community and has many key contacts at a variety of cities and counties throughout the state. Ian is involved in all of Otak’s CA/CEI projects, whether directly performing the construction project management duties or providing oversight duties on projects managed by other Otak construction project managers. He is adept with the ODOT materials and quantity documentation process for federal and state DOT standards. He holds a Master’s Degree in Construction Engineering Management and utilizes these skills through managing construction projects, performing constructability reviews and construction specification writing. Ian also provides insight and guidance during the design development phase of public works projects. He is a seasoned construction inspector and holds a variety of inspection certifications.</p>	<p><b>Construction Project Manager   3<sup>rd</sup> Street Enhancement Project; Tillamook County, Oregon</b> - Ian is the Work Order Contract manager and Construction Project Manager for this federally funded street widening and drainage improvement project in Tillamook County.</p> <p><b>Construction Project Manager   Mill Creek (Capitol St) Bridge; Salem, Oregon</b> - Ian was the Work Order Contract manager and Construction Project Manager for this federally funded bridge replacement, street enhancement, and utility upgrade project in Salem.</p> <p><b>Construction Project Manager   1<sup>st</sup> Street &amp; Main Avenue Sidewalks &amp; Bike Lanes; Irrigon, Oregon</b> - Ian was the Work Order Contract manager and Construction Project Manager for this federally funded (ARRA) street reconstruction and City utility upgrade project in Irrigon.</p> <p><b>Construction Project Manager   Fawcett Creek (S. Prairie Rd) Bridge; Tillamook County, Oregon</b> - Ian was the Work Order Contract manager and Construction Project Manager for this federally funded bridge replacement and stream enhancement project in Tillamook County.</p> <p><b>Construction Project Manager   SE Lake Rd: Oatfield Rd – Where Else Lane; Milwaukie, Oregon</b> - Ian was the Work Order Contract manager and Construction Project Manager for this federally funded street widening and stormwater treatment project in Milwaukie.</p> <p><b>Construction Project Manager   Elliott Creek Rd: Slate Creek Bridge; Josephine County, Oregon</b> - Ian is the Work Order Contract manager and Construction Project Manager for this federally funded bridge replacement project in Josephine County.</p> <p><b>Construction Project Manager   Fairgrounds Rd: US97 – Culver Hwy; Madras, Oregon</b> - Ian was the Work Order Contract manager and Construction Project Manager for this federally funded pedestrian path and lighting project in Madras.</p> <p><b>Construction Project Manager   OR47 &amp; E. Main St Sidewalks; Gaston, Oregon</b> - Ian was Work Order Contract manager and Construction Project Manager for this federally funded sidewalk and pedestrian improvement project in Gaston.</p>

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Ken Karnosh Quality Manager</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ Professional Engineer, OR (license renewal is currently lapsed)</li> </ul>
<p><b>Name of firm (only if sub):</b></p>	<p><b>US395: McKay Creek to Silvies Slough Design-Build Bundle 414; Oregon</b> Construction Quality Manager—This \$40 million design-build project in eastern Oregon included the replacement of seven bridges and the repair of one bridge along an Oregon Highway from Pendleton to Burns. The bridges were on a sensitive waterway and/or on a wild and scenic corridor. Otak provided quality management and inspection services during construction. Ken was the Quality Manager in charge of coordination with the design-build contractor and onsite inspectors, and organized quality/quantity reviews with the ODOT Regional Assurance Specialist (RAS).</p>
<p><b>Role on potential project assignments:</b> Quality Control Manager</p>	<p><b>First Street and Main Avenue Bike and Pedestrian Enhancement Project; Irrigon, Oregon</b> Construction Quality Manager—Otak provided CA/CEI services for this ODOT/Local Public Agency project in Region 5 funded by the American Recovery and Reinvestment Act (ARRA). The \$2M project included upgrading City-owned water and sewer facilities, and widening First Street and Main Avenue to include bike lanes and new stormwater treatment facilities. Ken performed the Quality Management function and ensured the documentation met or exceeded ODOT/FHWA standards.</p>
<p><b>Years of experience in proposed role:</b> 35+ <b>Professional Summary:</b> Ken has over 35 years of experience in all phases of highway construction, the majority of these years during his career at the Oregon Department of Transportation (ODOT). Ken has served Otak as a Construction Project Manager in the past and now focuses his time on performing Quality Management duties and office support services. Ken’s vast ODOT construction experience makes him an extremely valuable tool for Otak’s CA/CEI team and he is often utilized outside of his Quality Management role, including being used for constructability reviews, cost estimating, scheduling, contract change order and claim reviews, and review of quality and quantity documentation.</p>	<p><b>Mill Creek (Capitol St) Bridge; Salem, Oregon</b> Construction Quality Manager, Part-Time Inspector—Ken performed both quality management duties and part-time inspection on this bridge replacement project in Salem. Ken worked with the full-time project inspector, project manager and QCCS to ensure ODOT/FHWA quality requirements were fulfilled and that the project RAS reviews were successfully completed.</p> <p><b>Antelope Road; White City, Oregon</b> Construction Project Manager—Otak provided professional services for this roadway widening project at the intersection of Antelope Road and Highway 62 north of Medford. The improvements included widening the roadway to provide a center turn lane, two travel lanes, bike lanes, curb, sidewalks, and storm drainage. Ken performed the roles of both Project Manager and Quality Manager, ensuring all quality and quantity documentation was tracked and filed for review prior to final submittal.</p> <p><b>McAndrews Road Bridge over Bear Creek; Medford, Oregon</b> Construction Project Manager—Otak provided CA/CEI services for the McAndrews Road Bridge over Bear Creek project. Ken was the project manager for this \$8M bridge replacement project and worked closely with project inspectors to ensure material quality and quantity were documented and that the construction was performed according to the contract documents.</p>

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Karrie Eixenberger Owner / Manager</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ ODOT Technician and Inspector Certification #41596</li> <li>▪ ODOT Certified Aggregate Technician</li> <li>▪ ODOT Certified Embankment Technician</li> <li>▪ ODOT Certified Asphalt Technician I</li> <li>▪ ODOT Certified Density Technician</li> <li>▪ ODOT Quality Control Technician</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified Bridge Inspector</li> </ul> <p><b><u>QCCS Experience</u></b> As a QCCS on ODOT/LPA projects, duties include coordination with ODOT or Consultant Project Managers, field construction inspectors, ODOT Independent Assurance, ODOT Regional Assurance Specialists (RAS), and material suppliers. Recent QCCS project experience includes:</p> <ul style="list-style-type: none"> <li>• OR47 &amp; E. Main Street Sidewalks (Gaston), 2012 <i>(teamed with Otak)</i></li> <li>• Elliott Creek Rd; Slate Creek Bridge (Josephine County), 2012 <i>(teamed with Otak)</i></li> <li>• I-5: Marquam Bridge to Holladay, I-405 Fremont Bridge (Portland), 2012</li> <li>• SE Lake Rd: Oatfield Rd – Where Else Lane (Milwaukie), 2011 <i>(teamed with Otak)</i></li> <li>• Mill Creek (Capitol Street NE) Bridge (Salem), 2010 <i>(teamed with Otak)</i></li> <li>• 1<sup>st</sup> Street &amp; Main Avenue Sidewalks &amp; Bike Lanes (Irrigon), 2010 <i>(teamed with Otak)</i></li> <li>• Port of Astoria Pedestrian Paths (Astoria), 2010 <i>(teamed with Otak)</i></li> <li>• Bay Blvd (Newport), 2010</li> <li>• Fawcett Creek (S. Prairie Rd) Bridge (Tillamook), 2009 <i>(teamed with Otak)</i></li> <li>• Kuebler Road Widening (Salem), 2009</li> <li>• Newport Streets Resurfacing (Newport), 2009</li> <li>• Boeckman Rd: 95th to 110th Ave. (Wilsonville), 2006-2007</li> <li>• OR 126: Badger Mountain/ Cougar Pass Passing Lanes (Lane County), 2005</li> <li>• I-84 Quarry Bridges (Hood River County), 2003-2004</li> </ul> <p><b><u>Quality Control Management Experience:</u></b> As the Contractor's QC Manager, duties include being certified to perform field testing, monitor frequency of testing, and report field test results to the contractor and project manager. Recent Quality Control Management experience includes:</p> <ul style="list-style-type: none"> <li>• Contractor Quality Control Manager- Portland Streetcar Loop Project, 2009 - 2012</li> <li>• Contractor Quality Control Manager - I-205 LRT Extension, 2008 – 2009</li> <li>• Contractor Quality Control Manager - Washington County Commuter Rail, 2006 – 2008</li> </ul>
<p><b>Name of firm (only if sub):</b> KE &amp; Associates, Inc.</p>	
<p><b>Role on potential project assignments:</b> Quality Control Compliance Specialist (QCCS) / Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role:</b> 7</p> <p><b>Professional Summary:</b> Karrie is the owner and day to day operator of KE &amp; Associates with over 15 years of experience in quality control, laboratory testing, field inspection, asphalt and concrete mix design, writing technical reports, reviewing construction plans and specifications, and construction monitoring. For the past 7 years and since the inception of ODOT's QCCS program, Karrie has performed the role of QCCS on ODOT projects statewide. Possessing all material testing certifications, she has an excellent background to serve as a QCCS and assists Otak with coordinating the field-tested documentation with the contractor, ODOT Independent Assurance, and Regional Assurance Specialists (RAS). Prior to starting her own firm, Karrie held various positions including Laboratory Manager, Field Testing Supervisor, Engineering Specialist (Soils, asphalt mixes), and Radiation Safety Officer for nationally accredited geotechnical and environmental consulting firms and the Oregon Department of Transportation. Karrie also performs general inspection for large heavy civil construction projects where the contractor is required to provide inspections.</p>	

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Steve Littrell, PLS, WRE</p> <p>Construction Project Manager / Senior Construction Inspector</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ ODOT Inspection Certification # 40006 (re-certifications pending challenge exams)</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified HMAC Inspector</li> <li>▪ ODOT Certified Environmental Construction Inspector</li> <li>▪ ODOT Certified Drilled Shaft Inspector</li> <li>▪ ODOT Certified Traffic Signal Inspector</li> </ul> <p><b>3<sup>rd</sup> Street (US30) – School St.; Haines, Oregon</b> Construction Project Manager, Construction Inspector—Steve managed and often performed inspection duties on this project that constructed sidewalks and new street connections for a six block area for the City of Haines and ODOT. Steve performed an essential role on this retrofit project to ensure new grades matched into existing, which was very challenging at times.</p> <p><b>2<sup>nd</sup> St. &amp; Airport Road Paving; Lebanon, Oregon</b> Construction Project Manager—Steve managed this project consisting of grinding and paving a 10 block residential collector street and a few blocks of a main arterial street for the City of Lebanon and ODOT. The work was challenging in that 2<sup>nd</sup> Street was old and had some failing base, a small bridge to connect to, and the local railroad to cross as well as many residences to contend with during construction.</p> <p><b>Zigzag River (E. Lolo Pass) Bridge; Clackamas County, Oregon</b> Construction Inspector—Steve was an assistant project manager and lead inspector for this bridge replacement project. The new structure consists of a single-span, 197-foot steel girder superstructure with a concrete deck supported on driven pile integral abutments. Steve ensured the project was constructed according to the plans and kept all project quality and quantity documentation.</p> <p><b>Springwater Trail Three Bridges; Portland, Oregon</b> Construction Inspector—Steve inspected three pedestrian bridges for Portland Parks and Recreation to complete the Springwater Trail in SE Portland. New structures consisted of a 275-foot arch bridge crossing McLoughlin Blvd, a 190-foot single-span steel girder crossing Johnson Creek, and a steel truss crossing the UPRR tracks.</p> <p><b>OR214 @ Settlemier; Woodburn, Oregon</b> Construction Project Manager—Steve managed this project for ODOT and the City of Woodburn that reconstructed a major intersection with Highway 214 and provided utility adjustments and new storm drains, curbs, sidewalks, paving, striping, signing, and a traffic signal. In addition, the intersection served two schools nearby. The project lasted through two construction seasons and was very time consuming in the amount of coordination necessary with the City, the design consultant, and the school district.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b></p> <p>Construction Project Manager and Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role: 30</b></p> <p><b>Professional Summary:</b> Steve has over 30 years of construction experience, including work at both ODOT and for engineering consulting firms. Steve was a construction project manager for ODOT and joined the consulting world after retiring from the State in 2004. While at ODOT, Steve held positions in various maintenance offices, was a construction claims coordinator, and both an assistant and lead construction project manager in Region 2. In addition to his ODOT experience, Steve worked for OBEC Consulting Engineers prior to joining Otak, where he gained valuable experience working as a consultant on numerous ODOT/LPA construction projects, both in a project management and inspection role. Steve performs both construction management and construction inspection tasks, and utilizes his vast experience in construction to perform constructability reviews on many complex transportation projects. Steve holds all of ODOT's inspection certifications (re-certification pending challenge exams).</p>	

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Jack Boatwright Construction Project Manager / Senior Construction Inspector</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ Land Surveyor in training</li> <li>▪ ODOT Inspection Certification # 43694</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified HMAC Inspector</li> <li>▪ ODOT Certified Environmental Construction Inspector</li> <li>▪ ODOT Certified Drilled Shaft Inspector</li> </ul> <p><b>Oregon Department of Transportation (ODOT), OTIA III Bridge Program – Project Manager, Construction Inspector/Compliance Manager -</b> Jack was a lead inspector for HDR/OBDB for the construction phase of the OTIA III program that included construction administration, inspection, and quality control compliance on ODOT’s \$1.3 billion program that executed the replacement and repair of 350 bridges and the widening and/or reconstruction of several sections of the interstate and the state system.</p> <p><b>I-5: N. Santiam Hwy – Kuebler Blvd (Salem); Marion County, Oregon – Construction Inspector &amp; Administrator –</b> Jack was the lead inspector for this \$54 million project to replace 6 bridges, including a bridge over UPRR, and adding capacity to Interstate-5 in Salem. Responsibilities included coordinating inspection staff assignments, and ensuring that construction was in conformance with contract plans and specifications.</p> <p><b>I-5: Elkhead Road – OR126: Knowles Creek Design/Build; Douglas County, Oregon – Construction Inspector –</b> Jack led the inspection effort on this \$46 million Design/Build project replacing 5 bridges and rehabilitating 3 bridges on Interstate 5 and Oregon 126 near Eugene. Jack documented material quality and quantity and ensured construction met the intent of the project design.</p> <p><b>Boeckman Road: 95<sup>th</sup> Avenue – 110<sup>th</sup> Avenue; Wilsonville, Oregon – Construction Inspector –</b> Lead inspector for this \$19 million project that consisted of building 1 mile of new roadway including a 400 foot long bridge spanning an irrigation facility and wetlands area. Jack led the coordination effort and communicated daily with the project manager and contractor.</p> <p><b>I-5: North Albany Interchange; Linn County, Oregon – Project Manager, Construction Inspector –</b> Jack administered and inspected this \$1.2 million project to repair five bridges. He was responsible for ensuring construction was in conformance with contract plans and specifications.</p> <p><b>Bend Parkway Units 2B (\$6M) and Unit 3A (\$6M); Bend, Oregon – Project Manager, Construction Inspector –</b> Jack administered and inspected this project that constructed a new 6.9-mile long, four-lane limited access boulevard with raised medians, bicycle lanes and sidewalks, signals, illumination, storm drainage and water quality facilities on US97 through the City of Bend. Jack coordinated inspection activities by construction specialists, prepared monthly progress payment, and assembled quality documentation.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b> Construction Project Manager and Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role:</b> 30+</p> <p><b>Professional Summary:</b> Jack has over 30 years of experience in all aspects of construction administration and inspection on urban and rural transportation projects. He has performed contract administration and provided leadership and oversight to construction specialists performing construction management, construction inspection of roadway and bridge improvements including substantial earth excavation and embankment work, quality control compliance on field-tested and non-field tested materials, cost estimating and preparing/negotiating contract change orders, critical path method (CPM) schedule reviews, labor compliance, and quality audit reviews. His construction experience encompasses both state and federally funded projects for ODOT and Local Public Agencies.</p>	

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> George Dwire Senior Construction Inspector</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ ODOT Inspection Certification # 44546</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified HMAC Inspector</li> </ul> <p><b>3rd Street Enhancement Project; Tillamook, Oregon</b> Construction Inspector—George inspected this \$3M roadway widening project for ODOT and Tillamook County, including the installation of a new water main, storm system, bike and parking lanes, sidewalks, and lighting. The project was funded by FHWA requiring all documentation to meet FHWA standards.</p> <p><b>Mill Creek (Capitol Street) Bridge Replacement; Salem, Oregon</b> Construction Inspector—George inspected this bridge replacement project in downtown Salem near the Capitol Building. The project was owned by the City of Salem but administered by ODOT due to the FHWA funding, which required strict attention to detail with all documentation. Key project elements included bridge demolition, vibration monitoring, work area isolation, drilled piling, sheet piling, bridge superstructure construction, the installation of a new water main across the bridge, the removal of hazardous materials, and substantial community involvement and coordination. George prepared all field inspection report documentation.</p> <p><b>Fawcett Creek (S. Prairie Rd) Bridge; Tillamook, Oregon</b> Construction Inspector—George was the construction inspector for this federally funded bridge replacement project in Tillamook. The project involved a teamwork approach between all parties, including the County, ODOT, FHWA, the affected utilities and the surrounding community. Full-service construction management and inspection was performed in accordance with ODOT and FHWA standards.</p> <p><b>US395: McKay Creek to Silvies Slough Design-Build Bundle 414; Oregon</b> Construction Inspector—George was a part-time construction inspector for this \$35M design-build project in eastern Oregon that included the replacement of 7 bridges and the repair of an additional structure. George inspected two different project sites and prepared the required quality and quantity documentation.</p> <p><b>Highway 101: Long Prairie Road; Tillamook, Oregon</b> Construction Inspector—George inspected this LPA project in Tillamook County where US101 and Long Prairie Road were widened to allow for the construction of new turn lanes at the intersection. Work included substantial subexcavation, drainage improvements, new signal flashers, and close coordination with a variety of local utility companies. George’s role included substantial public relations duties to communicate closely with the County and nearby property owners.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b> Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role:</b> 40+</p> <p>George has over 40 years of construction experience, including construction inspection, construction management and administration, and construction surveying. His background also includes civil street design and sanitary sewer system design. He has extensive experience in construction inspection and quality/quantity documentation in accordance with FHWA and ODOT requirements. George has recently worked on several ODOT/FHWA/LA projects and has demonstrated his ability to provide excellent project documentation and communication skills. Prior to working for Otak, George worked for the City of Lake Oswego as their construction manager and was in charge of the City’s capital improvement program. George owns an RV that he often takes to relocate close to a project site to eliminate costly travel, lodging and per diem expenses.</p>	

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Tom Garner Construction Inspector</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ ODOT Inspection Certification # 40336</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified Environmental Construction Inspector</li> </ul> <p><b>Elliott Creek Road: Slate Creek Bridge; Josephine County, Oregon</b> Construction Inspector—Tom inspected this bridge replacement project for ODOT and Josephine County. He relocated using his RV to a site less than 10 miles from the project which assisted in keeping expenses down. Tom was responsible for tracking daily quantities, assisting with monthly contractor estimates, and ensuring the construction met the requirements of the contract documents.</p> <p><b>Fairgrounds Road: US97 – Culver Highway; Madras, Oregon</b> Construction Inspector—Tom inspected this ODOT project in the City of Madras which included the addition of a new asphalt pedestrian path adjacent to Fairgrounds Road. A new drainage ditch was also constructed, in addition to new street lighting and driveway accesses. The project documentation met FHWA standards due to the federal funding involved.</p> <p><b>First and Main Streets Bike and Pedestrian Enhancement Project; Irrigon, Oregon</b> Construction Inspector—Tom inspected portions of this street widening and pedestrian improvement project in Irrigon that was funded by the American Recovery and Reinvestment Act (ARRA). The funding source required strict attention to documentation and Tom assisted by monitoring material quality and quantity and ensuring the construction was in conformance to the contract plans and specifications.</p> <p><b>US395: McKay Creek to Silvies Slough Design-Build Bundle 414; ODOT Region 5</b> Construction Inspector—Tom was the lead inspector on this seven bridge replacement bundle project in eastern Oregon for ODOT Region 5. Tom inspected the daily construction at a variety of sites and documented the quality and quantity documentation required by ODOT. There were a variety of bridge foundation and superstructure types and substantial roadway reconstruction at each site.</p> <p><b>Bundle 302 Beacon Drive; Grants Pass, Oregon</b> Construction Inspector—Tom was the lead inspector for this design-build project that included the removal and replacement of two structures on I-5 at Beacon Drive near Grants Pass, and the repair of four other structures on I-5 in Grants Pass and over Jump Off Joe Creek and Wolf Creek. Tom led the inspection effort and assembled quality and quantity documentation to confirm payment to the contractor.</p> <p><b>Bundle A-09: I-5 - N. Ashland; Ashland, Oregon</b> Construction Inspector—Tom was the lead inspector for this project that ground out and replaced F-mix on I-5 between MP 19-26. The project also included the resurfacing of four bridge decks on I-5.</p>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b> Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role:</b> 17+</p> <p>Tom is a construction inspector with Otak. He has over 17 years of experience in construction inspection for both state and OTIA Funded construction projects. Tom is familiar with the ODOT materials and quality documentation. He has a good working knowledge of construction specifications as they relate to State/County and Federal projects. Tom holds a variety of ODOT's construction inspection certifications and owns an RV that he often takes to relocate close to a project site to eliminate costly travel, lodging and per diem expenses.</p>	

## Key Staff Resumes for CA/CEI Services

<p><b>Name &amp; Title:</b> Chad Maxwell, PE</p> <p>Assistant Construction Project Manager / Construction Inspector</p>	<p><b>Active Certifications, Certification Numbers, and previous roles on relevant projects:</b></p> <ul style="list-style-type: none"> <li>▪ Professional Engineer – Oregon</li> <li>▪ ODOT Inspection Certification # 44321</li> <li>▪ ODOT Certified Bridge Inspector</li> <li>▪ ODOT Certified General Inspector</li> <li>▪ ODOT Certified HMAC Inspector</li> <li>▪ ODOT Certified Environmental Construction Inspector</li> <li>▪ ODOT Certified Aggregate Technician</li> </ul>
<p><b>Name of firm (only if sub):</b></p>	
<p><b>Role on potential project assignments:</b></p> <p>Assistant Construction Project Manager &amp; Certified Construction Inspector</p>	
<p><b>Years of experience in proposed role: 8</b></p> <p>Chad is an assistant project manager and construction inspector with experience related to state and federal infrastructure development. Chad is familiar with construction materials and the quality documentation processes. He has a good working knowledge of construction specifications as they relate to LPA, State and Federal projects. Chad holds the majority of ODOT's inspection certifications and performs many erosion control inspections for Otak. Chad also has a strong background in design, utility coordination, and constructability which lends itself very well to anticipating and eliminating potential construction issues before they escalate to bigger issues.</p>	<p><b>OR47 &amp; E Main Street Sidewalk Improvement Project; Gaston, Oregon</b></p> <p>Construction Project Manager—Chad led this pedestrian improvement project for the City of Gaston and ODOT and coordinated directly with ODOT, the City and Otak's onsite inspector to facilitate the successful completion of this project. Chad drafted several contract change orders, assembled monthly progress estimates, and led weekly team meetings.</p> <p><b>SE Lake Road: Oatfield Rd – Where Else Lane; Milwaukie, Oregon</b></p> <p>Construction Inspector—Chad was the lead inspector on this ODOT/FHWA funded project for ODOT and the City of Milwaukie. The project included over half a mile of roadway widening, significant upgrades to the City's water and storm systems, onsite stormwater runoff treatment facilities, and new pedestrian enhancements. Chad documented daily quantities and material quality to conform to ODOT standards.</p> <p><b>US395: McKay Creek to Silvies Slough Design-Build Bundle 414; Oregon</b></p> <p>Construction Inspector—Chad was an inspector on this 7 bridge replacement bundle project in eastern Oregon for ODOT Region 5. He inspected the daily construction at two sites and documented the quality and quantity documentation required by ODOT. There were a variety of bridge foundation and superstructure types and substantial roadway reconstruction at each site.</p> <p><b>Highway 30 Sidewalk Improvement; Scappoose, Oregon</b></p> <p>Construction Inspector—Chad inspected this sidewalk retrofit project for ODOT/FHWA in the City of Scappoose. Chad worked directly with the contractor to ensure ADA requirements were being met, inspected erosion control measures on a daily basis, and completed project quality/quantity documents.</p> <p><b>Port of Astoria – Pedestrian Access Path; Astoria, Oregon</b></p> <p>Construction Inspector—Chad was the lead construction inspector for this project in Astoria that constructed nearly a mile of pedestrian pathway and installed 125 illuminated bollards for pedestrian safety. In addition to his inspection role, Chad completed the quality and quantity documentation according to ODOT and FHWA standards.</p>

**Reference Questionnaire Form for Construction Contract Administration, Construction Engineering & Inspection (CA/CEI); ODOT RFP 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>Fawcett Creek (S. Prairie Rd) Bridge</b>			
Proposing Firm: <b>Otak, Inc.</b>			
Subconsultant that performed CA/CEI Services (if applicable):			
Location: <b>Tillamook County, Oregon</b>		Consultant's PM: <b>Ian Machan, PE</b>	
Project Type: <b>Bridge Replacement, Stream Enhancement, Stormwater Treatment</b>		Email: <a href="mailto:ian.machan@otak.com">ian.machan@otak.com</a>	
		Ph: <b>503.699.4546</b>	
<p>The Otak team led the CA/CEI effort to replace an 11-foot diameter culvert with a single-span bridge over Fawcett Creek. In the winter of 2008, as Otak was working on the preliminary design, a significant storm produced a high flow event that washed the culvert and roadway approaches out. This prompted the County and ODOT to obtain Federal Emergency Relief (ER) funds to accelerate the schedule to allow for construction in 2009- one full construction season ahead of schedule.</p> <p>Key features for this project included a driven pile foundation with buried riprap for scour protection, precast bulb I beams and a cast in place concrete deck superstructure, drainage improvements, roadway approaches, asphalt paving, streambed enhancements, and utility coordination. The new bridge was constructed in one stage with the road closed and a short detour in place for local traffic. The project incorporated the installation of a water line across the bridge, which was coordinated with a separate project in which both Tillamook County and Pleasant Valley Water District were key stakeholders.</p> <p>The project involved a teamwork approach between all parties, including the County, ODOT, FHWA, contractor, affected utilities and the surrounding community. Full-service CA/CEI was performed in accordance with ODOT and FHWA standards. Otak completed these services within the established budget and assisted with keeping the project schedule on track. Due to the delayed start of construction caused by the late bid date associated with the accelerated project design, the Otak CA/CEI team diligently worked to provide the appropriate staff resources to keep up with the contractor as they worked to maintain an aggressive schedule to get the bridge open to traffic by the end of the 2009 construction season. With the inclusion of federal funds, Otak maintained detailed quality and quantity documentation and carefully tracked construction submittals, monthly progress estimates, and contract change orders.</p> <p>The project ultimately was completed within the authorized contract amount with limited change orders and Otak received very positive feedback from both the County and nearby property owners expressing their support and gratitude for a smooth project with minimal disruption. Due to tireless work from ODOT, the County, and Otak, this project that was to be designed in 2008-2009 and constructed in 2010 was completed a whole year ahead of schedule.</p>		 	
Contract #: <b>25316</b>	WOC # (if applic.): <b>4</b>	Constr. Start (Mo/Yr): <b>06/2009</b>	Constr. Complete (Mo/Yr): <b>12/2009</b>
Construction Cost: <b>\$1 million</b>	Consultant Services Contract/WOC Amount (incl. as amended): <b>\$245,000 (for CA/CEI-related services)</b>		
<b>B. Client Information</b>			
Client Name: <b>Tillamook County</b>			
Client's PM: <b>Liane Welch, PE</b>		Alt client contact: <b>JJ Johnson</b>	
Email: <a href="mailto:lwelch@co.tillamook.or.us">lwelch@co.tillamook.or.us</a>		Title: <b>ODOT Region 2 Local Agency Liaison</b>	
Ph #: <b>503.842.3419</b>		Email: <a href="mailto:john.W.Johnson@odot.state.or.us">john.W.Johnson@odot.state.or.us</a>	
		Ph #: <b>503.986.5834</b>	

**C. Reference Responses**

INSTRUCTIONS: This is a reference questionnaire for the above named firm for consultant services provided on the above named project. Please provide rating for the criteria below using the ratings guidelines provided below. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form no later than [redacted] to [redacted] at the following address: [redacted]**

Phone number for questions: [redacted]

	<p><b>Ratings Guidelines:</b></p> <p><b>Exceptional 9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good 7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory 4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal 1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory 0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>	<p><b>Rating Scores</b> ↓</p>
1	Rate the firm's efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate the firm's responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did the firm coordinate/communicate with its staff, subcontractors, client staff, and other stakeholders?	
4	How well did the firm stay within the budget for CA/CEI Services?	
5	Rate the firm's timeliness and accuracy of Progress Payment Estimates submitted by consultant monthly for construction contractor payment.	
6	Rate the firm's effectiveness and efficiency in issuing construction contract change orders.	
7	Rate the accuracy and completeness of the project quality and quantity documentation prepared by the firm.	
8	How well did the firm appear to apply sufficient staff resources with the appropriate skills and expertise?	
9	Rate the quality of the firm's draft or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
10	How would you rate your overall experience with the firm?	

TOTAL SCORE \_\_\_\_\_

Note: The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for Construction Contract Administration, Construction Engineering & Inspection (CA/CEI); ODOT RFP 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>Mill Creek (Capitol St NE) Bridge</b>			
Proposing Firm: <b>Otak, Inc.</b>			
Subconsultant that performed CA/CEI Services (if applicable):			
Location: <b>Salem, Oregon</b>		Consultant's PM: <b>Ian Machan</b>	
Project Type: <b>Bridge Replacement, Scour Protection, Roadway &amp; Utility Improvements</b>		Email: <b>ian.machan@otak.com</b>	
		Ph: <b>(503) 699-4546</b>	
<p>Otak completed the CA/CEI services for this complex bridge replacement project in downtown Salem, approximately three blocks from the State Capitol Building. The small project footprint contained many difficult challenges, including extremely stringent vibration restrictions, the presence of hazardous materials in the subgrade, unique bridge construction methods including pre-drilled piles and permanent sheet pile scour walls, the installation of a new 18-inch water main, utility coordination and relocation, and a very tight construction schedule. Due to the location of this project, public involvement and coordination with the various interested agencies throughout construction was of key importance. With the inclusion of federal funds, this project required that all quality and quantity documentation meet FHWA standards.</p>		 	
<p>The Otak team, including subcontractors, worked diligently to coordinate with the City, ODOT and the contractor to provide timely responses to avoid construction delays. Otak made the necessary staffing adjustments to meet the contractor's accelerated schedule when they began working 10-12 hour days, six days per week. The dedicated CA/CEI staff was intent on making the project a success and worked meticulously to ensure documents such as submittal reviews, monthly progress estimates, and contract change orders were tracked and completed in a timely fashion and with high quality. With a partnership approach to project management and coordination, Otak, the City and ODOT were able to successfully complete this project within the allotted timeframe and budget.</p>			
<p>In addition to the many complex construction issues resulting from site constraints, the project team also overcame difficulties working with a construction contractor that required some oversight and assistance to meet the intent of the project plans and specifications, and generally stay on track to successfully complete the project. Otak's construction project manager and construction inspector worked tirelessly with the contractor to ensure proper progress was made, acceptable construction practices were utilized, and materials incorporated into the project met project specifications. The result of this careful management, inspection and coordination produced a successful project that eliminated construction claims and provided the City with a new bridge project to be proud of.</p>			
Contract #: <b>25316</b>	WOC # (if applic.): <b>1</b>	Constr. Start (Mo/Yr): <b>05/2010</b>	Constr. Complete (Mo/Yr): <b>06/2011</b>
Construction Cost: <b>\$2.3 million</b>	Consultant Services Contract/WOC Amount (incl. as amended): <b>\$375,000 (for CA/CEI-related services)</b>		
<b>B. Client Information</b>			
Client Name: <b>ODOT Region 2</b>			
Client's PM: <b>JJ Johnson</b>		Alt client contact: <b>John Echeverri</b>	
Email: <b>John.W.JOHNSON@odot.state.or.us</b>		Title: <b>City of Salem Project Manager</b>	
Ph #: <b>503.986.5834</b>		Email: <b>JEcheverri@cityofsalem.net</b>	
		Ph #: <b>503.588.6211</b>	

**C. Reference Responses**

INSTRUCTIONS: This is a reference questionnaire for the above named firm for consultant services provided on the above named project. Please provide rating for the criteria below using the ratings guidelines provided below. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form no later than [redacted] to [redacted] at the following address: [redacted]**

Phone number for questions: [redacted]

	<p><b>Ratings Guidelines:</b></p> <p><b>Exceptional 9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good 7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory 4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal 1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory 0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>	<p><b>Rating Scores</b> ↓</p>
1	Rate the firm's efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate the firm's responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did the firm coordinate/communicate with its staff, subcontractors, client staff, and other stakeholders?	
4	How well did the firm stay within the budget for CA/CEI Services?	
5	Rate the firm's timeliness and accuracy of Progress Payment Estimates submitted by consultant monthly for construction contractor payment.	
6	Rate the firm's effectiveness and efficiency in issuing construction contract change orders.	
7	Rate the accuracy and completeness of the project quality and quantity documentation prepared by the firm.	
8	How well did the firm appear to apply sufficient staff resources with the appropriate skills and expertise?	
9	Rate the quality of the firm's draft or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
10	How would you rate your overall experience with the firm?	

TOTAL SCORE \_\_\_\_\_

Note: The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for Construction Contract Administration, Construction Engineering & Inspection (CA/CEI); ODOT RFP 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>First Street and Main Avenue Sidewalks and Bike Lanes (Irrigon)</b>			
Proposing Firm: <b>Otak, Inc.</b>			
Subconsultant that performed CA/CEI Services (if applicable):			
Location: <b>Irrigon, Oregon</b>		Consultant's PM: <b>Ian Machan, PE</b>	
Project Type: <b>Pedestrian &amp; Roadway Enhancement</b>		Email: <b>ian.machan@otak.com</b>	
		Ph: <b>(503) 699-4546</b>	
<b>Brief Project Description and Proposing Firm's Role:</b>			
<p>Otak provided CA/CEI services for this American Recovery and Reinvestment Act (ARRA) funded project that was fast-tracked through the design phase based on a 120-day obligation status. The acceleration during design required close attention to detail during the construction phase to address several unanticipated conditions, including substandard City water and sanitary sewer facilities that were re-designed and added to the contract as a change order.</p> <p>This pedestrian enhancement project involved construction of sidewalk facilities on a primary school route for children accessing the elementary and Jr/Sr. High Schools as well as significant roadway improvements and upgrades to the City's storm and sanitary sewer and water systems. As part of this project, stormwater treatment facilities, street lighting, paver sidewalks and street trees were constructed to improve the look and functionality of Main Street which is a key section of the City's downtown improvement plan. Otak administered and inspected the project and also tracked all material quality and quantity to ensure the project would receive fully participating federal funds.</p> <p>A key issue for both ODOT and the City was to ensure the project budget was carefully monitored and that change orders and cost overruns were limited due to the available funding. The ARRA funds dedicated to this project were restricted, meaning the City would be required to pick up any costs above those originally budgeted for. The Otak team worked tirelessly with the City and ODOT over the course of the accelerated design phase and throughout the construction phase to hone the design, add and eliminate certain project elements to best align with the project budget, and provide timely inspections that ensured the construction was meeting the intent of the contract plans. Otak brought value to this project by continually protecting the best interests of the City of Irrigon and ensuring the project would fit within the established budget. Several unanticipated subsurface conditions and unknown issues with City water and sanitary sewer facilities led to unexpected costs, requiring additional funding. Otak assisted the City and ODOT in drafting these requests for funding and was successful in obtaining the entire value from FHWA required to complete the project without the City having to contribute any funding other than their original match.</p>			
			
			
Contract #: <b>25316</b>	WOC # (if applic.): <b>5</b>	Constr. Start (Mo/Yr): <b>04/2009</b>	Constr. Complete (Mo/Yr): <b>06/2010</b>
Construction Cost: <b>\$1,573,536</b>		Consultant Services Contract/WOC Amount (incl. as amended): <b>\$190,000</b>	
<b>B. Client Information</b>			
Client Name: <b>ODOT Region 5</b>			
Client's PM: <b>Laura Slater (now self-employed)</b> Email: <b>lauraslater@oregonwireless.net</b> Ph #: <b>(541) 805-8510</b>		Alt client contact: <b>Doug Wright</b> Title: <b>ODOT Region 5 – Local Agency Liaison (now Union County Public Works Director)</b> Email: <b>dwright@union-county.org</b> Ph #: <b>(541) 963-1016</b>	

**C. Reference Responses**

INSTRUCTIONS: This is a reference questionnaire for the above named firm for consultant services provided on the above named project. Please provide rating for the criteria below using the ratings guidelines provided below. If any of the criteria are outside of your area, please obtain input from the appropriate individual who may have information. **Please email the completed Reference Form no later than [redacted] to [redacted] at the following address: [redacted]**

Phone number for questions: [redacted]

	<p><b>Ratings Guidelines:</b></p> <p><b>Exceptional 9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good 7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory 4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal 1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory 0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>	<p><b>Rating Scores</b> ↓</p>
1	Rate the firm's efforts to collaboratively resolve negotiation issues in a timely manner.	
2	Rate the firm's responsiveness to questions and efforts to collaboratively resolve issues throughout the contract term and the firm's method of escalating unresolved issues.	
3	How well did the firm coordinate/communicate with its staff, subcontractors, client staff, and other stakeholders?	
4	How well did the firm stay within the budget for CA/CEI Services?	
5	Rate the firm's timeliness and accuracy of Progress Payment Estimates submitted by consultant monthly for construction contractor payment.	
6	Rate the firm's effectiveness and efficiency in issuing construction contract change orders.	
7	Rate the accuracy and completeness of the project quality and quantity documentation prepared by the firm.	
8	How well did the firm appear to apply sufficient staff resources with the appropriate skills and expertise?	
9	Rate the quality of the firm's draft or final deliverables. (Was significant input by client or revision by firm required to meet contract requirements or applicable industry standards?)	
10	How would you rate your overall experience with the firm?	

TOTAL SCORE \_\_\_\_\_

Note: The score for this Reference Questionnaire will be the average of all rating scores provided by the client contact. If some of the criteria are not responded to or marked as "N/A", total the scores provided and divide by the number of criteria responded to.

**Reference Questionnaire Form for Construction Contract Administration, Construction Engineering & Inspection (CA/CEI); ODOT RFP 25134**

<b>A. Consultant and Project Information</b>			
Project Title: <b>Upper Sucker Creek (Holland Loop Rd) Bridge</b>			
Proposing Firm: <b>Otak, Inc.</b>			
Subconsultant that performed CA/CEI Services (if applicable):			
Location: <b>Josephine County, Oregon</b>		Consultant's PM: <b>Ian Machan</b>	
Project Type: <b>Bridge Replacement, Scour Protection, Stream Enhancement &amp; Roadway Improvements</b>		Email: <a href="mailto:ian.machan@otak.com">ian.machan@otak.com</a>	
		Ph: <b>(503) 699-4546</b>	
<p>As the prime consultant for Josephine County, Otak provided CA/CEI services throughout the duration of this bridge replacement and streambed enhancement project. The project included State funding and was included as part of ODOT's OTIA III bridge replacement program and was let by the County. Otak performed all construction project management, inspection and quality/quantity documentation in conformance with ODOT standard procedures. The new bridge consisted of a 293-foot three-span, prestressed beam with concrete deck bridge supported on driven pile foundation. Construction included a temporary access road and work bridges on the downstream side of the bridge, sheet pile cofferdams for construction of the interior abutments, and significant in-stream work to rebuild the stream bank and a natural scour pool.</p>			
<p>The Otak team included environmental experts that assisted with the stream channel reconstruction and the armoring of the new stream bank upstream of the bridge. Otak worked closely with the contractor to carefully construct these non-standard features and the team was extremely pleased to watch the stream bank establish itself over the one year plant establishment and monitoring period.</p>			
<p>Otak also supplied staff for this project that led to cost savings for the County, including an onsite inspector that relocated near to the site in his RV and a construction project manager with several other southern Oregon projects running concurrently that assisted with combined trips and reduced travel expenditures. The Otak team took a personal interest in the project budget and worked diligently to ensure the County would not incur additional and un-budgeted costs.</p>			
<p>Otak came in under the consultant CA/CEI budget and the final project construction cost came in 3% under budget, demonstrating excellent project management, work quality, and cost control throughout the duration of construction. The project managed to maintain this budget even after encountering unanticipated and very difficult pile driving conditions, resulting in a change order to compensate for unexpected subsurface conditions. Otak worked diligently with the County and construction contractor to devise other opportunities for cost savings, modifying several design alternatives to allow for cost underruns to balance out the pile driving overrun. Ultimately, the project came in nearly \$200,000 under budget and was completed on schedule.</p>			
Contract #: <b>ATA 23460</b>	WOC # (if applic.): <b>4</b>	Constr. Start (Mo/Yr): <b>04/2007</b>	Constr. Complete (Mo/Yr): <b>06/2008</b>
Construction Cost: <b>\$2.8 million</b>		Consultant Services Contract/WOC Amount (incl. as amended): <b>\$400,000 (for CA/CEI-related services)</b>	
<b>B. Client Information</b>			
Client Name: <b>Josephine County</b>			
Client's PM: <b>Charles A. DeJanvier, PE</b>		Alt client contact: <b>Rob Brandes</b>	
Email: <a href="mailto:cdejanvier@co.josephine.or.us">cdejanvier@co.josephine.or.us</a>		Title: <b>Public Works Director, Josephine Co.</b>	
Ph #: <b>(541) 474.5460</b>		Email: <a href="mailto:rbrandes@co.josephine.or.us">rbrandes@co.josephine.or.us</a>	
		Ph #: <b>541.474.5460</b>	

**C. Reference Responses**

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Phone number for questions: [redacted]

	<p><b>Ratings Guidelines:</b></p> <p><b>Exceptional 9-10 points:</b> Exceeded expectations and well above average to work with. Very high user satisfaction.</p> <p><b>Very Good 7-8 points:</b> Met all expectations and exceeded in some areas.</p> <p><b>Satisfactory 4-6 points:</b> Met all contract requirements and/or professional expectations; may have had minor problems but implemented satisfactory corrective actions.</p> <p><b>Marginal 1-3 points:</b> Some performance and/or professional expectations not met; ineffective corrective actions for some problems.</p> <p><b>Unsatisfactory 0 points:</b> Technical, budget or schedule performance expectations not met. Low user satisfaction.</p> <p><b>Not Applicable (N/A):</b> Enter NA if not applicable for the project.</p>	<p><b>Rating Scores</b> ↓</p>
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TOTAL SCORE \_\_\_\_\_

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