Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: Friday, January 11, 2019
To: JPACT and Interested Parties
From: Ken Lobeck, Funding Programs Lead, 503-797-1785
Subject: January 2019 MTIP Formal Amendment plus Approval Request of Resolution 19-4961

STAFF REPORT

FOR THE PURPOSE OF ADDING OR AMENDING EXISTING PROJECTS TO THE 2018-21 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM INVOLVING ELEVEN PROJECTS IMPACTING ODOT, OREGON CITY, AND TRIMET (JA19-05-JAN)

BACKROUND

What this is:
The January 2019 Formal Metropolitan Transportation Improvement Program (MTIP) Amendment bundle (for FFY 2019) contains required changes and updates impacting ODOT, Oregon City and TriMet. Eleven projects comprise the amendment bundle. Most of the requested changes are for ODOT funded/managed projects.

Several projects require cost increases due to scope updates, combining efforts, and additional scope requirements being added to the projects. The USDOT/ODOT/MPO Amendment Matrix defines the parameters for formal amendments and administrative modifications. Projects that involve a major scope change require a formal amendment to demonstrate that fiscal constraint is still maintained, no impacts to air quality results, and the project still provides final deliverables that consistent with project entry in the Regional Transportation Plan (RTP), or with the original funding award. The three primary types of existing project changes that trigger the need for a formal amendment include: (1) Scope changes, (2) limit changes, and (3) cost changes.

Scope Changes:
Major scope changes usually involve the addition or deletion of a specified non capacity-work element such as having to include unforeseen storm water mitigation improvements as part of the project, or adding ADA compliance scope activities. Some scope changes result when two or more projects are combined together to be delivered under the same construction contract. The combining effort may result in significant cost savings where additional scope improvements can be added to the project which initially were thought to be beyond the project's budget. As final design progresses, the revised scope of work will be compared to the original planned improvement to determine the impact of the changes and if they are considered major or minor and how they impact the project's final environmental document. When the scope is determined to be major, then a formal/full amendment is required to the MTIP and STIP to complete the changes.

Limit Changes:
A result of a major scope change is often seen upon the project limits. The scope change may result in extending the project or shortening it depending on the type of scope element that is added to the project. For years, MTIP/STIP staff, STIP coordinators, FHWA staff, project managers, and Local Agency Liaisons (LAL) have argued of what constitutes a "significant" limit change for a project resulting in the need for a formal/full amendment. FHWA resolved the debate by establishing

that limit changes beyond 0.25 miles are considered a major change and require a formal/full amendment to complete. Therefore, if the scope change results in a change in the environmental footprint (*i.e. the project limits change*) greater than a ¼ mile, the change must be made via a formal/full amendment.

Cost Changes beyond the Amendment Matrix Threshold:
The third type of change that can trigger a formal/full amendment is a cost change (increase or decrease) that exceeds the Amendment Matrix's Cost Change threshold. For projects with a total project cost of $1 million or greater, the allowable cost increase or decrease that can occur via an administrative modification is up to 20%. If the total cost change to the project is 20% or greater for these types of projects ($1 million or greater), then a formal/full amendment is required to be completed. Determining a project's accurate total cost early before NEPA even begins is more of an art than science. How much should the project manager add contingency funding to properly address the costs and not get blindside at the end of final design with a 30% or greater cost increase to the project? Multiple cost factors may impact the project which the project manager may or may not foresee. Unfortunately, these factors can and will contribute to significant costs above the administrative threshold, and by far are the most common reason for the formal amendment

As a result of the above three areas, the number of mid-year formal amendments increase as more accurate design costs are realized, required limit changes are inserted into the project, and scope changes emerge as projects grow closer to completing final design. The January 2019 Formal MTIP amendment involves eleven projects which nine are impacted from a combination of major scope, limit, and/or funding changes.

What is the requested action?

TPAC requests JPACT's approval recommendation to Metro Council for resolution 19-4961 enabling the eleven identified projects to be amended correctly into the 2018 MTIP, with final approval to occur from USDOT.

The summary of the eleven projects is shown in the below table:

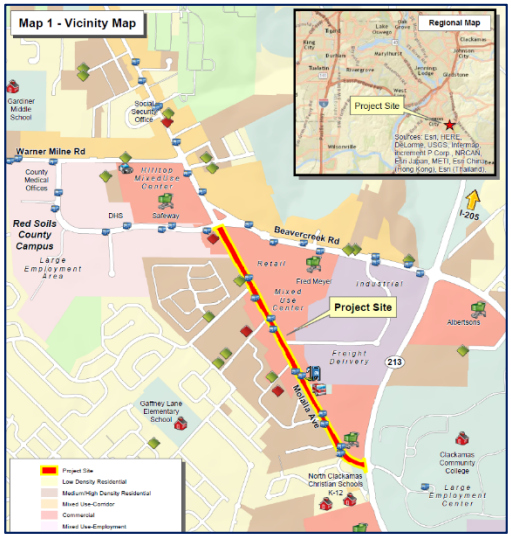
ODOT Key	Lead Agency	Project Name	Description	Required Changes
Project #1 **Key 20810**	Oregon City	Molalla Ave: Beaver Creek Rd to OR213	Construct bike lanes along the entire Molalla Ave: Beavercreek Rd to Highway 213 with Continuous ADA compliant sidewalks ramps; trees and ped level street lighting on west side of corridor; transit amenities along both sides of the corridor and street furnishings	**REMOVED PROJECT:** This Metro 2019-21 RFFA federally funded project completed a fund swap for local funds and is now a de-federalized project. No federal approvals are required to deliver and complete the project. As such, the project is not required to be programmed in the MTIP or STIP. Key 20810 is being removed from the MTIP through this amendment.

Project #2 **Key 20451**	ODOT	~~OR8 at River Road~~ **OR8 at River Rd & OR224 at Lake Rd**	~~Full signal upgrade with illumination and ADA improvements~~ Full signal upgrade with illumination and ADA improvements at the intersection of OR8 and River Rd in the City of Hillsboro. Replace overhead flasher with ground mounted advance flashers at the intersection of OR224 and Lake Rd in Clackamas County.	**COMBINED PROJECT:** Amendment combines scope and funding from two projects: 20454 and 20507 plus adds $300k in a new Other phase for railroad improvements. Combining Keys 20454 into 20451, adding funding from 20507 and from the ODOT railroad crossing project grouping bucket will reduce overhead costs and allow for efficiencies in delivery.
Project #3 **Key 20454**	ODOT	OR224 at Lake/Harmony	Replace overhead flasher with ground mounted advance flashers.	**COMBINED/CANCELED PROJECT:** Scope and funding totaling $109,078 is combined onto Key 20451. As a result Key 20454 is left with $0 funding and is being removed from the MTIP
Project #4 **Key 20507**	ODOT	OR213 (82nd Ave) at Madison High School	Replace signal; rebuild and restripe existing crosswalk; add crosswalks and close a driveway.	**FUND SWAP/DE-FEDERALIZATION:** Key 20507 is being de-federalized upon review of the project and similar project in development by Portland Public Schools (PPS). ODOT will contribute $560,250 state funds to the project (IGA in development). This amendment serves to convert the project into a locally funded and delivered project. PPS's delivery schedule is ahead of ODOT's project. The amendment for Key 20507 also advances ROW, UR and CN all to 2019. A budget shortfall has been identified on project K20451. $560,250 Enhance funds from this project are being reallocated to K20451.
Project #5 **Key 20430**	ODOT	~~I-5: MP 303.27 - MP 308.63~~ **I-5: Marine Dr - Fremont Bridge**	Install variable speed advisory signs on I-5 northbound and southbound from the Fremont Bridge to Marine Drive	**COST INCREASE/LIMITS & SCOPE CHANGE:** Cost increases have occurred to the Preliminary Engineering phase which are being addressed. Causes include extended design period of 6-months, additional administrative/ management costs, design modifications, and added agency coordination requirements. The Amendment changes the project name to reflect the reduced scope. Project mile points are adjusted to match the engineer's plans and removing the Hayden Island location. The construction phase is reduced by $314,000 and moved to PE . Finally, the construction phase is being advance from 2020 to 2019.
Project #6 **Key 20481**	ODOT	I-405: Fremont (Willamette River) Bridge	Paint bridge approaches; other section as funding allows.	**COST DECREASE:** $10 million of construction phase funding is being transferred to Key 20077, Major Bridge Maintenance FFY 2019, the Statewide Project Grouping bucket to support strengthening of major bridges in Region 1. OTC approval was required for this action to occur.

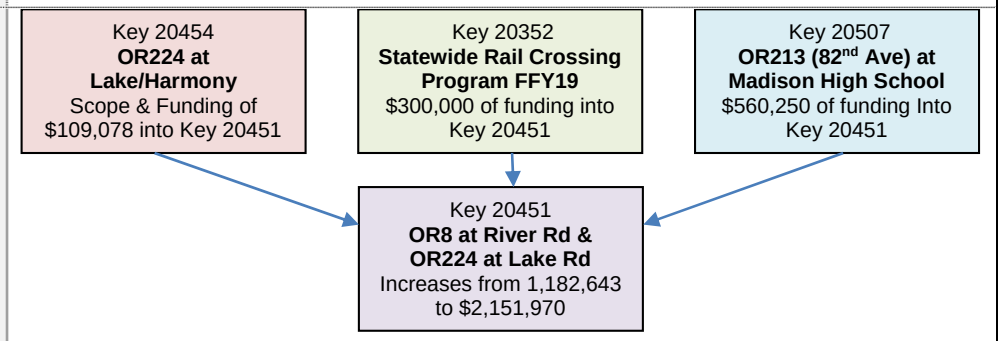
Project #7 **Key 20484**	ODOT	SW Multnomah Blvd over I-5	Place a structural overlay on the deck; replace or repair leaking joints; and retrofit the bridge rails to meet safety standards.	**COST INCREASE:** PE and construction phase increase in cost by a total of $967,800 to the project. The shortfalls in both phases are addressed through this amendment.
Project #8 **Key 20702**	ODOT	OR99W SB Ramp to I-5 SB (Capitol Highway Interchange)	In SW Portland on OR99W at SW Capitol Highway IC on SB Ramp to I-5, preserve deck with structural overlay	**COST INCREASE:** Preliminary Engineering and construction phases increase in cost due to use of external consulting for PE while construction phase added minor scope elements including cleaning and painting of the steel bearings plus the replacement of deficient ADA ramps. The project cost also was adjusted for inflation. The total project cost increases from $408,000 to $1,335,494.
Project #9 **Key 20465**	ODOT	~~I-5: Barbur Blvd NB connection bridge~~ **OR99W: Barbur Boulevard Northbound Connection Bridge**	Paint structure; remove pack rust. Replace rivets and bolts.	**COST INCREASE:** Preliminary Engineering and construction phases increase in cost due to use of external consulting for PE while the construction phase has increased due to bid prices, plus the costs of the containment for paint removal/paint application and the disposal of hazardous waste were not included in the original project estimate. The project name is being updated to reflect that the mile points are actually for OR99W, and not I-5. There are no changes to the project location or scope. The total project cost increase is $828,692.
Project #10 **Key 20298**	ODOT	~~I-84: Fairview - Marine Drive & Tooth Rock Tunnel~~ **I-84: Fairview - Marine Drive**	Repave a section of I-84 between Fairview and Marine Dr repaves the Tooth Rock tunnel and installs a full signal upgrade (including ADA) at NE238th Ave. ~~Deck overlay and repair joints on the McCord Creek Bridge (#02193B).~~	**SCOPE CHANGE:** A more extensive project for Tooth Rock Tunnel is being scoped for the 21-24 STIP cycle. Through this amendment, the Tooth Rock Tunnel paving work from this project's scope to be re-added in the 21-24 STIP. Similarly, the McCord Creek Bridge is being considered for the 21-24 STIP. As such, this scope element also is removed Key 20298. The project name and description are updated as a result. The revised project scope results in a cost decrease to the project.
Project #11 Key **21126**	TriMet	FY18 TriMet Prevent Maint (TOD Fund Exchange)	Enables the annual Transit Oriented Development (TOD) fund exchange to occur	**CANCELED PROJECT:** Key 21126 is a duplicate entry in the MTIP to TriMet's Key 21262 which already obligated its funds. Key 21126 is being removed from the MTIP as a corrective action.

A detailed summary of the eleven projects being amended is provided in the tables starting on the next page.

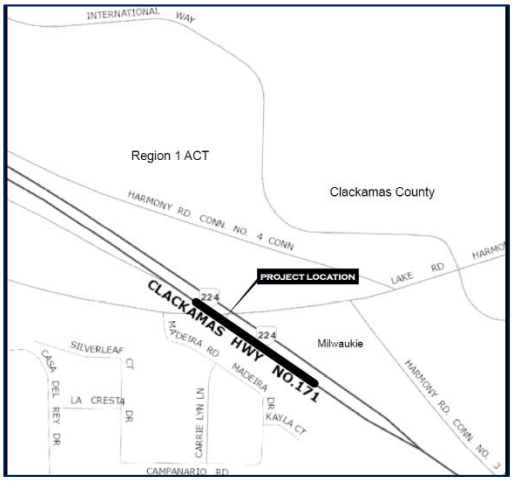
Projects 1:	**Molalla Ave. Beavercreek Rd - Hwy 213**		
Lead Agency:	**Oregon City**		
ODOT Key Number:	**20810**	MTIP ID Number:	70885
Projects Description:	Project Snapshot: • Source: Metro RFFA Awarded Project • Funding: 2019-21 RFFA Award • Type: Active transportation project • Location: Molalla Ave • Cross Streets: Beavercreek Rd to Hwy 214 • Project approved for de-federalization via Metro-TriMet Fund Exchange • Mile Post Limits: N/A • Current Status Code: 3 - In Preliminary Engineering phase • Proposed improvements: Bike lanes along the entire Molalla Ave: Beavercreek Rd to Highway 213. Continuous ADA compliant sidewalks ramps; trees and ped level street lighting on west side of corridor; transit amenities along both sides of the corridor and street furnishings • STIP Amendment Number: TBD • MTIP Amendment Number: JA19-05-JAN		
What is changing?	**AMENDMENT ACTION: REMOVING THE PROJECT FROM THE MTIP** Key 20810 was initially awarded $3,800,632 of federal funds through the 2019-21 Metro Regional Flexible Fund Allocation (RFFA). Subsequent to this award, a project review indicated Key 20810 would be a good candidate for de-federalization. The requirements for de-federalization include the following: • The MTIP is not required as part of any federal approvals (e.g. obligating the project funds). • No federal approvals are required for the project to implement phases and expend local funds. • The project is a non-capacity enhancing project and inclusion in the Metro modeling network to demonstrate a capacity improvement is not required. • The project is not subject to air quality improvements as a condition of funding. • The project is considered "exempt" from the requirement to demonstrate conformity per 40 CFR 93.126, Table 2 or 40 CFR 93.127 Table 3. • The project does not possess any scope improvements considered sensitive to the public where MTIP programming is deemed necessary. No federal approvals appear required allowing Oregon City to complete the project separately from the regular federal delivery process. The MTIP is not required to obligate the project's local funds. From an air quality viewpoint, the project is exempt under 40 CFR 93.126, Table 2, "Air Quality - Bicycle and pedestrian facilities category". The project is also		



	considered a non-capacity improvement. Local funds from TriMet were used to swap out the federal funds. TriMet will use the federal funds in support of their federal project needs. By replacing the federal funds with local funds, Oregon City can move forward to deliver the project faster than if the project remained federalized. Without federal approvals required to deliver the project, now funded by only local funds, and as an exempt project, Key 20810 is not necessary to remain in the MTIP. The project is being removed from the MTIP through this amendment. Metro has completed a local Intergovernmental Agreement (IGA) with Oregon City and will monitor the project delivery status separate from the MTIP requirements. Local funding as shown in the funding table remains committed to deliver the project.
Additional Details:	The project will be monitored internally my Metro in a similar fashion to federally funded projects.
Why a Formal amendment is required?	Removing (or canceling) a project in the MTIP with Metro funding requires a formal amendment. per the approved FHWA/FTA/ODOT/MPO MTIP/STIP Amendment Matrix
Total Programmed Amount:	The approved project total cost of $7,985,379 remains for the project. However, it will no longer appear in the MTIP.
Added Notes:	

Project #2:	~~**OR8 at River Road**~~ **OR8 at River Rd & OR224 at Lake Rd**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20451**	MTIP ID Number:	70669
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It Region 1 • Projected Fund Type: NHPP for PE & Cons, State STP for ROW • Type: Operations – Signalized Intersections • Location: OR-8 • Cross Streets: OR8 at River Rd and OR224 at Lake Rd • Mile Post Limits: 11.70 to 11.75 • Current Status Code: 1 – Pre PE obligation/Amendment required • Proposed improvements: ~~Full signal upgrade with illumination and ADA improvements~~ Full signal upgrade with illumination and ADA improvements at the intersection of OR8 and River Rd in the City of Hillsboro. Replace overhead flasher with ground mounted advance flashers at the intersection of OR224 and Lake Rd in Clackamas County. • STIP Amendment Number: 18-21-2034 • MTIP Amendment Number: JA19-05-JAN		
What is changing?			

AMENDMENT ACTION: KEY 20451 IS HAVING SCOPE AND FUNDING FROM KEYS 20454, 20352, AND 20507 COMBINED INTO IT



The scope of work initially was to provide a full signal upgrade with illumination and ADA improvements. A project review determined that Key 20454 and 20451 can be delivered together under the same construction contract due to overlapping scope activities. By combining both projects, cost savings and delivery efficiencies are increased. However, a funding shortfall still existed which funding transfers from 20507 and 20352 resolved. The funding shortfall results from changing the delivery strategy from "in-house managed" to "external consultant driven" which increased the PE and Construction phases.

Key 20454 is ODOT's OR224 at Lake Harmony project. The project locations on OR224 at MP 2.4 to 2.5 are now assimilated into 20451. Combined together with Key 20451, the project name is updated to be "**OR8 at River Rd & OR224 at Lake Rd.** The project description is updated to reflect combined projects and now is Full signal upgrade with illumination and ADA improvements at the intersection of OR8 and River Rd in the City of Hillsboro. Replace overhead flasher with ground mounted advance flashers at the intersection of OR224 and Lake Rd in Clackamas County.

The scope and funding from Key 20454 (also this amendment bundle) of $109,078 is being combined into Key 20451. This leaves Key 20454 zeroed programmed and will be removed from the MTIP.

Shifting $560,250 from Key 20507 to Key 20451 resolves the funding shortfall in the new combined 20451 project. The funds are available as ODOT is splitting funding from their OR213 (82nd Ave) at Madison High school project in Key 20507 by de-federalizing it (also this amendment bundle). The federal funds from Key 20507 are available as a nearly duplicate project is being implemented by Portland Public Schools. As a result ODOT has agreed to de-federalize Key 20507 which frees up the $560,250 of federal funds for Key 20451. See discussion and funding adjustments under Key 20507 for this portion.

Finally, $300,000 is also being committed from ODOT's Statewide Rail Crossing Program in Key 20352. The $300,000 will support necessary railroad improvements within the project limits. Because Key 20352 is a statewide project grouping funding bucket and located outside the MPO boundary area, it is not programmed in the

MTIP. It does no need to be included in this amendment bundle. ODOT will make the required funding reduction in the 2018 STIP separate from his amendment.

As a result of combining 20454 into 20451 and the funding transfers from 20352 and 20507:

- The Preliminary Engineering phase increases by $375,378 from $282,877 to $658,255 in 2019.
- An" Other" phase for necessary railroad improvements is created with $300,000 planned to occur in 2019.
- The Right-of-Way phase remains unchanged at $91,548 and is still planned for 2020.
- The Construction phase increases by $293,950 from $808,217 to $1,102,167.
- The total project cost increases by $969,328 from $1,182,643 to $2,151,970

Additional Details:

Fund code Translations:
Z240 = State STP-FLX = State Surface Transportation Improvement Program-Flex
Z001 – NHPP-FAST = National Highway Performance Program – FAST Act
ZS40 = Rail Hwy Cross Haz = Rail-Highway Crossing Hazards

2018-2021 Active STIP — CLACKAMAS — 2018-2021 Active STIP

Name: OR224 at Lake/Harmony — Key: 20454

Description: Replace overhead flasher with ground mounted advance flashers. — Region: 1
MPO: Portland Metro MPO — Work Type: OP-SSI
Applicant: ODOT — Status: PROJECT SCHEDULED FOR CONSTRUCTION

Location(s)

Mileposts	Length	Route	Highway	ACT	County(s)
2.40 to 2.50	0.10	OR-224	CLACKAMAS	REGION 1 ACT	CLACKAMAS

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2020			2021		
Total		$55,128.00			$53,950.00		$109,078.00
Fund 1		Z240 $49,466.35			Z001 $48,409.34		
Match		$5,661.65			$5,540.66		

Footnote: $ 109,078 Total Operations allocation

2018-2021 Active STIP — STATEWIDE — 2018-2021 Active STIP

Name: Statewide Rail Crossing Program FFY19 — Key: 20352

Description: Funding for the statewide rail crossing program for Federal fiscal year 2019. Projects to be selected based on the program requirements and need. — Region: 6
MPO: Non-MPO — Work Type: SAFETY
Applicant: ODOT RAIL DIVISION — Status: BUCKET OF FUNDS

Location(s)

Mileposts	Length	Route	Highway	ACT	County(s)
				STATEWIDE	STATEWIDE

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2019		
Total					$10,692,619.20		$10,692,619.20
Fund 1					ZS40 $9,623,357.28		
Match					$1,069,261.92		

Footnote:

Most Recent Amendment Approved

Amendment No: 18-21-1847 — Approval Date: 12/7/2018
Requested Action: Reduce project estimate by $300,000, moving funds to project key 19683.

Name: OR213 (82nd Ave) at Madison High School **Key:** 20507

Description: Replace signal, rebuild and restripe existing crosswalk, add crosswalks and close a driveway. Region: 1

MPO: Portland Metro MPO Work Type: OP-SSI

Applicant: ODOT Status: PROJECT SCHEDULED FOR CONSTRUCTION

Location(s)

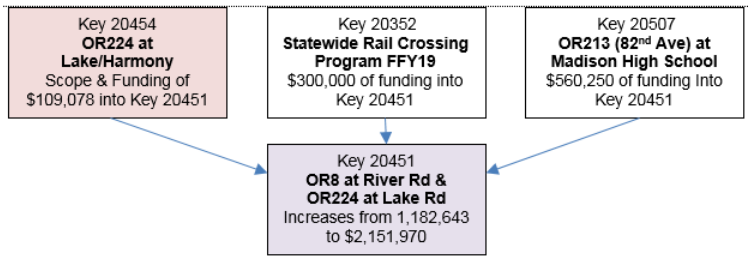
Mileposts	Length	Route	Highway	ACT	County(s)
1.64 to 1.65	0.01	OR-213	CASCADE NORTH	REGION 1 ACT	MULTNOMAH

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2019	2020	2020	2021		
Total		$215,000.00	$149,500.00	$11,000.00	$745,000.00		$1,120,500.00
Fund 1		Z001 $192,919.50	Z240 $134,146.35	Z240 $9,870.30	Z001 $668,488.50		
Match		$22,080.50	$15,353.65	$1,129.70	$76,511.50		

Footnote: $ 1,120,500 Total Operations allocation

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, a project's with a major scope change require a formal amendment to complete the required changes. The addition of OR224 to the project and the railroad scope activities along with the cost increase trigger the need for a formal amendment.
Total Programmed Amount:	The total project programming increases from $1,182, 643 to $2,151,970
Added Notes:	OTC approval was required to complete the changes and are expected to occur during their January 2019 meeting

Project #3:	**OR224 at Lake/Harmony**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20454**	MTIP ID Number:	70997
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It Region 1 • Projected Fund Type: Pre-amendment = State STBG-Flex • Type: Operations – Safety and Traffic Control • Location: OR-224 • Cross Streets: at Lake/Harmony Rd • Mile Post Limits: 2.40 to 2.50 • Current Status Code: 1 – Pre PE obligation, Consolidation action requiring an amendment • Proposed improvements: Replace overhead flasher with ground mounted advance flashers. • STIP Amendment Number: 18-21-2034 • MTIP Amendment Number: JA19-05-JAN		
What is changing?	**AMENDMENT ACTION: KEY 20454 SCOPE AND FUDNING OF $109,078 IS BEING COMBINED INTO KEY 20451**  As discussed in Key 20451, **OR8 at River Rd & OR224 at Lake Rd,** the scope and funding Key 2045 are being combined into Key 20451. This will enable both projects to be delivered under the same contract and provide efficiencies in delivery.		

Additional Details:

If the this were a straight project combination effort, where no new funds are added or scope change occurs, the combining could occur via an Administrative Modification, However, the project also includes a funding shortfall resulting in additional funds added to the project from Keys 20352 and 20507, the new funding and updated scope activities trigger the need for a formal amendment.

As a result of combining Key 20454 into 20451, Key 20454 is left with $0 programming dollars and is being removed from the MTIP.

Fund Code Translation:
Z240 = State STBG-Flex (State Surface transportation Block Grant – Flex)
Z001 = NHPP-FAST (National Highway Performance Program – FAST ACT)

2018-2021 Active STIP | **CLACKAMAS** | **2018-2021 Active STIP**

Name: OR224 at Lake/Harmony — Key: 20454

Description: Replace overhead flasher with ground mounted advance flashers. — Region: 1
MPO: Portland Metro MPO — Work Type: OP-SSI
Applicant: ODOT — Status: PROJECT SCHEDULED FOR CONSTRUCTION

Location(s)

Mileposts	Length	Route	Highway	ACT	County(s)
2.40 to 2.50	0.10	OR-224	CLACKAMAS	REGION 1 ACT	CLACKAMAS

Current Project Estimate

	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year		2020			2021		
Total		$56,[illegible]28.00			$5[illegible]50.00		$1[illegible],078.00
Fund 1		Z240 [illegible]49,466.35			Z001 [illegible]48,409.34		
Match		$5,661.65			$5,540.66		

Footnote: $ 109,078 Total Operations allocation

Scope and funding is combined into 20451

Why a Formal amendment is required?

Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, Key 20454 is part of the larger combining effort into 20451 which requires a formal amendment. The changes to Key 20454 proceed under the larger formal amendment for Key 20451.

Total Programmed Amount:

The total project programming decreases from $109,078 to $0

Added Notes:

OTC approval was required and is scheduled to occur during their January 2019 meeting

Projects 4: OR213 (82nd Ave) at Madison High School

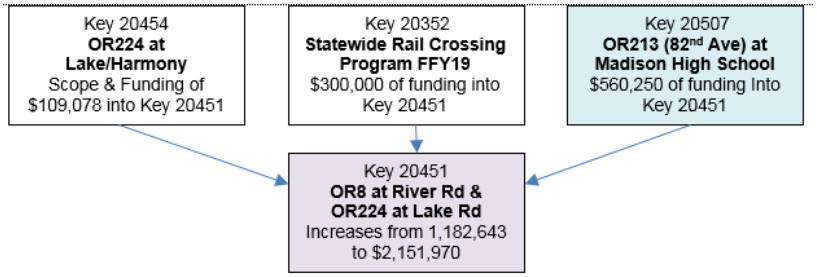
Lead Agency:	**ODOT**		
ODOT Key Number:	**20507**	MTIP ID Number:	70981

Project Description:

Project Snapshot:

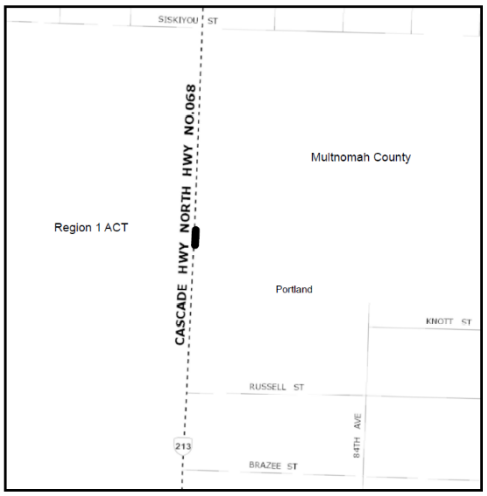
- Source: ODOT Awarded Project
- Funding: ODOT Fix-It Region 1
- Projected Fund Type: State STBG-FLEX replaced by Local Other and State funds
- Type: Operations – Safety
- Location: OR-213
- Cross Streets: 82nd Ave at Madison High School
- Mile Post Limits: 1.64 to 1,65
- Current Status Code: 1 – Pre PE obligation/Amendment required
- Proposed improvements: Replace signal, rebuild and restripe existing crosswalk, add crosswalks and close a driveway.
- STIP Amendment Number: 18-21-2034
- MTIP Amendment Number: JA19-05-JAN

AMENDMENT ACTION: DE-FEDERALIZE AND REPLACE WITH STATE FUNDS PLUS COMBINE WOTH PORTLAND PUBLIC SCHOOLS PROJECT



What is changing?

Portland Public Schools (PPS) is developing their own Madison High School Project with the same scope as ODOT's project. PPS' project is ahead of schedule from ODOT's project and is already proceeding through design.



Because both projects are identical (except ODOT's version is federalized), ODOT is de-federalizing their version and combining it with PPS' project. ODOT is contributing $560,250, to PPS' Madison High School project. The remaining $560,250 of federal funds from ODOT's project is being transferred to Key 20451, OR8 at River Rd & OR224 at Lake Rd project to fill the existing funding shortfall.

Additional Details:

The final amended project will reflect a combined locally funded and state funded project with the same scope. The other major change is since PPS's project is further in the delivery process, Right-of-Way, Utility Relocation, and Construction are being accelerated into 2019 as shown below.

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
~~State STBG-FLX~~	~~Z240~~	~~2019~~		~~$ 192,920~~				
~~State STBG-FLX~~	~~Z240~~	~~2020~~			~~$ 134,146~~			
~~State STBG-FLX~~	~~Z240~~	~~2020~~				~~$ 9,870~~		
~~State STBG-FLX~~	~~Z240~~	~~2021~~					~~$ 668,489~~	
								$ -
								$ -
State Funds								
State	**S010**	**2019**					**$ 560,250**	**$ 560,250**
								$ -
								$ -
							State Total:	**$ 560,250**
Local Funds								
~~Local~~	~~Match~~	~~2019~~		~~$ 22,081~~				
Other	**OTH0**	**2019**		**$ 215,000**				$ 215,000
~~Local~~	~~Match~~	~~2020~~			~~$ 15,354~~			
Other	**OTH0**	**2019**			**$ 149,500**			$ 149,500
~~Local~~	~~Match~~	~~2020~~				~~$ 1,130~~		
Other	**OTH0**	**2019**				**$ 11,000**		$ 11,000
~~Local~~	~~Match~~	~~2021~~					~~$ 76,512~~	
Other	**OTH0**	**2019**					**$ 184,750**	$ 184,750
								$ -
							Local Total	**$ 560,250**
Phase Totals Before Amend:			$ -	$ 215,001	$ 149,500	$ 11,000	$ 745,001	$ 1,120,502
Phase Totals After Amend:			$ -	$ 215,000	$ 149,500	$ 11,000	**$ 745,000**	**$ 1,120,500**
							Year Of Expenditure (YOE):	$ 1,120,500

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, de-federalizing a project acts from a fiscal constraint perspective as canceling a project which requires a formal amendment.
Total Programmed Amount:	The total project programming in Key 20507 remains unchanged at $1,120,500 through the de-federalization action
Added Notes:	OTC approval is required and is planned to occur during their January 2019 meeting

Projects #5:	~~I-5: MP 303.27 - MP 308.63~~ **I-5: Marine Dr - Fremont Bridge**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20430**	MTIP ID Number:	70972
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It Region 1 • Projected Fund Type: HSIP (Federal Highway Safety Improvement Program) and utilizing ADVCON (Advance Construction) as an obligation placeholder • Type: Operations – Safety and Traffic Control • Location: I-5 • Cross Streets: Fremont Bridge north to Marine Drive • Mile Post Limits: 303.27 to 308.63 changed to be 302.80 to 307.30 • Current Status Code: 4 – Completing PS&E/Final Design • Proposed improvements: Install variable speed advisory signs on I-5 northbound and southbound from the Fremont Bridge to Marine Drive • STIP Amendment Number: 18-21-2062 • MTIP Amendment Number: JA19-05-JAN		
What is changing?	**AMENDMENT ACTION: COST INCREASE WITH SCOPE ADJUSTMENTS AND LIMIT CHANGES** The project has experienced cost increases due to several factors which include: ▪ PE phase requiring an extended design schedule to address agency and consultant needs. ▪ Change in the agency project manager and area manager overseeing the project. ▪ Added effort in completing traffic control plans triggering additional management meetings and advisory committee meetings. ▪ Incorporating design modifications from Maintenance involving security fencing ▪ Added coordination with WASHDOT related to traffic control device extending onto the State of Washington As a result, the project scope is dropping the northernmost ITS site (Hayden Island) in order to stay within budget. Removing this site reduces the construction phase estimate allowing for savings to be applied to the PE phase. The impact of these		

	changes results in changes to the project's limits, scope and name to keep within the project award. The summary of changes include the following: ▪ Hayden Island ITS site is removed from the project scope ▪ The updated construction phase cost decreases from $6,413,000 to $6,099,000. ▪ $314,000 of construction phase funding is transferred to the PE phase. The PE phase increases from $1,386,500 to $1,700,500 ▪ The project limits are adjusted from 303.27 to 308.63 to be 302.80 to 307.30. ▪ The project name is updated from its current MP reference of I-5: MP 303.27 - MP 308.63 to be I-5: Marine Dr - Fremont Bridge. ▪ The project's cost remains unchanged at $7,799,500.
Additional Details:	The use of the fund type code ADVCON, Advance Construction, is also being used as an obligation placeholder for the added PE phase and construction phase obligations. However, the financial plan for the project still reflects federal HSIP as the planned funding source for the project.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
HSIP	ZS30	2017		$ 1,386,500				$ 1,386,500
ADVCON	**ACP0**	**2017**		**$ 314,000**				$ 314,000
~~HSIP~~	~~ZS30~~	~~2020~~					~~$ 6,413,000~~	
ADVCON	**ACP0**	**2019**					**$ 6,099,000**	$ 6,099,000
								$ -
								$ -
								$ 7,799,500
State Funds								
								$ -
								$ -
							State Total:	**$ -**
Local Funds								
								$ -
								$ -
							Local Total	**$ -**
Phase Totals Before Amend:			$ -	~~$ 1,386,500~~	$ -	$ -	~~$ 6,413,000~~	$ 7,799,500
Phase Totals After Amend:			$ -	**$ 1,700,500**	$ -	$ -	**$ 6,099,000**	**$ 7,799,500**
							Year Of Expenditure (YOE):	$ 7,799,500

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, a project in the MTIP requires a formal amendment when the limits change more than 0.25 miles. This reflect a significant change to the footprint of the environmental document resulting in the need for the formal amendment. The net change of the project limits decrease from 5.36 miles to 4.50 miles reflecting a 0.50 mile change to the project limits.
Total Programmed Amount:	The total project programming amount remains unchanged at $7,799,500
Added Notes:	OTC approval was not required for the changes. Approval of the required changes occurred through ODOT's Change Management Request (CMR) process

Projects #6:	**I-405: Fremont (Willamette River) Bridge**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20481**	MTIP ID Number:	70973
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It SW Bridge • Projected Fund Type: NHPP-FAST (Federal National Highway Performance Program – FAST Act) • Type: Bridge • Location: I-405/Fremont Bridge		

- Cross Streets: Just east of Loring St west across the Willamette River to just west of Naito Pkwy
- Mile Post Limits: 3.12 to 3.53
- Current Status Code: 1 – Pre-PE Obligation Activities
- Proposed improvements: Paint bridge approaches; other section as funding allows.
- STIP Amendment Number: 18-21-2166
- MTIP Amendment Number: JA19-05-JAN

What is changing?

AMENDMENT ACTION: COST DECREASE

This amendment will complete OTC requested action to transfer $10 million from the I-405 Fremont Bridge painting project in Key 20481 to ODOT's Major Bridge Maintenance project grouping bucket in Key 20077. The $10 million is being transferred from Key 20481's construction phase reducing it from $26,854,258 to $16,854,258. The ODOT bridge program has determine the cost reduction can occur to Key 20481.

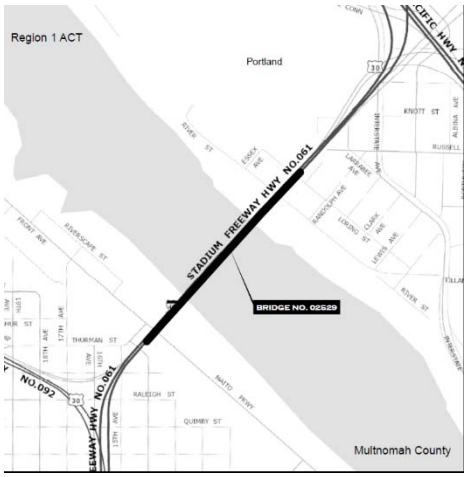
Key 20077 is ODOT's statewide project grouping bucket for required FFY 2019 major bridge maintenance. The fund transfer will support efforts to strengthen Region 1 bridges during FFY 2019.

STIP Amendment Funding Summary

Project	Current Funding	Proposed Funding
Major bridge maintenance FFY19 (KN 20077)	$10,000,0000	$20,000,000
I-405: Fremont (Willamette River) Bridge (KN 20481)	$27,794,616	$17,794,616
TOTAL	**$37,794,616**	**$37,794,616**

Project to increase funding:

Major bridge maintenance FFY19 (KN 20077)			
		Cost	
Phase	Year	Current	Proposed
Preliminary Engineering	N/A	$0	$0
Right of Way	N/A	$0	$0
Utility Relocation	N/A	$0	$0
Construction	2019	$10,000,000	$20,000,000
	TOTAL	**$10,000,000**	**$20,000,000**



Additional Details:

Fund Code Translation: S010 = ODOT State funds

2018-2021 Active STIP **STATEWIDE** **2018-2021 Active STIP**

Name: **Major bridge maintenance FFY19** Key: **20077**

Description **Major bridge maintenance funding for Federal fiscal year 2019. Projects will be selected based on requirements of the funds.** Region: **6**

MPO: **Non-MPO** Work Type: **BR-MBM**

Applicant: **ODOT** Status: **PROJECT SCHEDULED FOR CONSTRUCTION**

Location(s)

Mileposts	Length	Route	Highway	ACT	County(s)
		Various	VARIOUS HIGHWAYS	STATEWIDE	STATEWIDE

Current Project Estimate

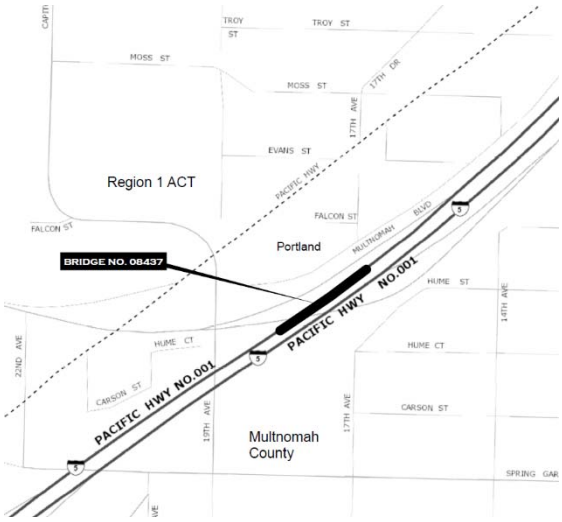
	Planning	Prelim. Engineering	Right of Way	Utility Relocation	Construction	Other	Project Total
Year					2019		
Total					$10,000,000.00		$10,000,000.00
Fund 1					S010 $10,000,000.00		
Match							

Footnote:

In 1990, the State of Oregon established a major bridge maintenance (MBM) program, to specifically address major and emergency bridge repairs that were not selected in the STIP or other funding sources. This type of work is generally determined to be of high enough priority that waiting for the STIP or other funding

	source is not an acceptable solution. This is also identified as work the district maintenance program normally wouldn't be able to accomplish due to maintenance crew budget or staff limits, and to address needs that were not anticipated. One use of MBM funding is to strengthen bridges to address concerns identified through the inspection and load rating processes. The Bridge Engineering Section is in the final phase of completing initial load ratings for every highway bridge. The analysis is being accomplished with a combination of ODOT engineers and consultants. While a basic load rating analysis is sufficient for most bridges, advanced analysis is used for larger, more complicated structures. Advanced analysis can also be used for bridges that show the need for strengthening based on the basic analysis, but do not show signs of distress. There are three major bridges in Portland that are currently having advanced analysis. While the advanced analysis may reduce the amount of strengthening that is required for these bridges to remain in unrestricted service, some strengthening will be required when the analysis is completed. The three major Region 1 bridges identified include the following: **Willamette River, Interstate 5 (Marquam)** – The steel girders that support the upper deck needs to have bracing added to satisfy the modern specifications. **Willamette River, U.S. 30 Bypass (St. Johns)** – There are portions of the truss that require bracing to satisfy the modern specifications, and also some connection plates that may require strengthening. **Willamette River, Oregon 99 West (Steel)** - This bridge is owned by the Union Pacific Railroad. There is a lease agreement with ODOT and TriMet for highway traffic and light rail. This is a unique bridge and the primary issue is the need to coordinate with the railroad to determine the actual loading due to freight trains.
Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, cost changes for project costing $1 million or greater require a formal amendment to complete. The cost decrease of $10 million dollars represents a 35.9% change to the project and is above the 20% threshold.
Total Programmed Amount:	The project's total programming decreases from $27,794,616 to $17,794,616
Added Notes:	OTC approval is required for the changes and approval is expected to occur during their January 2019 meeting.

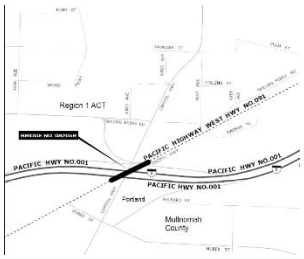
Projects #7:	**SW Multnomah Blvd over I-5**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20484**	MTIP ID Number:	70976
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It Region 1 • Projected Fund Type: A combination of federal funds including Redistribution and ADVCON (Advance Construction) are committed to the project currently. • Type: Bridge – structures • Location: SW Multnomah Blvd over I-5 • Cross Streets: Approximately 17th Ave to near 19th Ave • Mile Post Limits: 296.51 to 296.59 • Current Status Code: 4 – Completing PS&E/Final Design • Proposed improvements: Place a structural overlay on the deck; replace or repair leaking joints; and retrofit the bridge rails to meet safety standards.		

	• STIP Amendment Number: 18-21-2043 • MTIP Amendment Number: JA19-05-JAN
What is changing?	**AMENDMENT ACTION: COST INCREASE** The Southwest Multnomah Boulevard Bridge over Interstate 5 is a 404 foot long bridge built in 1959 that is in fair condition. The Southwest Multnomah Boulevard over Interstate 5 project will address the extensive deck cracking with a structural concrete overlay, replace or repair leaking joints, and upgrade the bridge rails so that they meet modern safety standards. Overpass protective screening will also be added to deter objects from being thrown from the overpass onto Interstate 5.  The project initially was intended to complete the Preliminary Engineering phase via internal staff and resources. The project PE cost estimate was based on this assumption. External consulting will now be used to complete design requirements. This change has increased the PE phase cost estimate by $310,900. The construction phase also has increased in cost die to the addition of overpass protective screening and subsequent change to 2020 as the revised delivery date. These changes increase the construction phase by $656,900. The added funding will originate from a combination of the cancellation of Key 20540 (a Region 5 bridge project), the removal of bridge scope/funding from Key K20298, and $400K from Statewide Bridge funding buckets in Keys 20082/ K20083.
Additional Details:	As stated above, the PE phase will increase from $213,000 to $523,900 which the construction phase increase from $1,358,000 to $2,014,900. The overall total project cost increases from $1,571,000 to $2,538,800.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
~~NHPP-FAST~~	~~Z001~~	~~2017~~		~~$ 191,125~~				
Redistribution	**ZS30**	**2017**		**$ 191,125**				$ 191,125
ADVCON	**ACP0**	**2017**		**$ 278,971**				$ 278,971
~~NHPP-FAST~~	~~Z001~~	~~2020~~					~~$ 1,218,533~~	
ADVCON	**ACP0**	**2020**					**$ 1,807,970**	$ 1,807,970
								$ -
								$ 2,278,066
State Funds								
State	Match	2017		$ 21,875				$ 21,875
State	**Match**	**2017**		**$ 31,929**				$ 31,929
~~State~~	~~Match~~	~~2020~~					~~$ 139,467~~	
State	**Match**	**2020**					**$ 206,930**	$ 206,930
								$ -
							State Total:	**$ 260,734**
Local Funds								
								$ -
								$ -
							Local Total	**$ -**
Phase Totals Before Amend:			$ -	~~$ 213,000~~	$ -	$ -	~~$ 1,358,000~~	$ 1,571,000
Phase Totals After Amend:			$ -	**$ 523,900**	$ -	$ -	**$ 2,014,900**	**$ 2,538,800**
							Year Of Expenditure (YOE):	$ 2,538,800

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, cost changes for project costing $1 million with a cost change of 20% or greater require a formal amendment. The net cost increase to the project is $967,800 which represents a 61.6 % increase to the project.
Total Programmed Amount:	The total project programming amount increases from $1,571,000 to $2,538,800
Added Notes:	OTC approval was required for the changes with approval expect to occur during their January 2019 meeting.

Projects #8:	**OR99W SB Ramp to I-5 SB (Capitol Highway Interchange)**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20702**	MTIP ID Number:	71016
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It SW Bridge plus HB2017 Seismic • Projected Fund Type: Federal ADVCON (Advance Construction) is being used to program the committed funding for later phase obligation flexibility needs. • Type: Bridge – structures • Location: OR-99W • Cross Streets: At SW Capitol Highway interchange • Mile Post Limits: 6.19 to 6.24 • Current Status Code: 1 – Completing Pre-PE Obligation activities • Proposed improvements: Preserve deck with a structural overlay • STIP Amendment Number: 18-21-2043 • MTIP Amendment Number: JA19-05-JAN		
What is changing?	**AMENDMENT ACTION: COST INCREASE**  The Oregon 99 West southbound ramp to Interstate 5 southbound (Capitol Highway Interchange) is a 270 foot long bridge built in 1959 that is in fair condition. The project will address the top layer of the concrete deck that has required patches where pieces have separated, with a structural concrete overlay. The project will also replace or repair leaking joints, clean and paint steel bearings that are corroded, replace the asphalt near the bridge approaches that is failing, and replace deficient Americans with Disabilities Act (ADA) ramps that are within the project limits.		

The estimate for preliminary engineering was based on the design being done internally, and did not fully account for roadway, traffic control, and project management costs. Since this project will be designed by a consultant, the engineering costs have increased. The cost increase to the PE phase is $307,500.

OR 99W SB Ramp to I-5 SB (Capital Highway Interchange) (KN 20702)			
		COST	
PHASE	YEAR	Current	Proposed
Preliminary Engineering	2019	$40,000	$347,500
Right of Way	N/A	$0	$0
Utility Relocation	N/A	$0	$0
Construction	2020	$368,000	$987,994
TOTAL		$408,000	$1,335,494

Project to be decreased:

I-84: Fairview – Marine Drive & Tooth Rock Tunnel (KN20298)			
		COST	
PHASE	YEAR	Current	Proposed
Preliminary Engineering	2019	$751,930	$401,930
Right of Way	2020	$2,488	$2,488
Utility Relocation	N/A	$0	$0
Construction	2021	$5,037,730	$4,387,730
TOTAL		$5,792,148	$4,792,148

Project to be cancelled:

I-84 eastbound over US395 (Emigrant Avenue Interchange) (KN20540)			
		COST	
PHASE	YEAR	Current	Proposed
Preliminary Engineering	2018	$300,000	$20,322
Right of Way	2019	$50,000	$0
Utility Relocation	2019	$25,000	$0
Construction	2020	$1,137,500	$0
TOTAL		$1,512,500	$20,322

Construction costs have increased to account for the addition of the cleaning and painting of the steel bearings, replacement of deficient ADA ramps, and for inflation. The cost increase to the construction phase is $619,994. Funds are to come from a combination of the cancellation of K20540 (a Region 5 bridge project), and the removal of bridge scope/funding from K20298.

Additional Details:

The programming revisions appear as shown below with the total project cost increasing from $408,000 to $1,335,494.

PROJECT FUNDING DETAILS								
Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
~~ADVCON~~	~~ACP0~~	~~2019~~		~~$ 35,892~~				
ADVCON	ACP0	2019		$ 311,812				$ 311,812
ADVCON	ACP0	2020					$ 330,206	
ADVCON	ACP0	2020					$ 886,527	$ 886,527
								$ -
								$ -
							Federal Total:	$ 1,198,339
State Funds								
~~State~~	~~Match~~	~~2019~~		~~$ 4,108~~				
State	Match	2019		$ 35,688				$ 35,688
~~State~~	~~Match~~	~~2020~~		-			~~$ 37,794~~	
State	Match	2020					$ 101,467	$ 101,467
								$ -
							State Total:	$ 137,155
Local Funds								
								$ -
								$ -
							Local Total	$ -
Phase Totals Before Amend:			$ -	~~$ 40,000~~	$ -	$ -	~~$ 368,000~~	~~$ 408,000~~
Phase Totals After Amend:			$ -	$ 347,500	$ -	$ -	$ 987,994	$ 1,335,494
							Year Of Expenditure (YOE):	$ 1,335,494

Why a Formal amendment is required?

Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, cost changes for project costing $1 million with a cost change of 20% or greater require a formal amendment. The net cost increase to the project is $927,494 which represents a 227% increase to the project.

Total Programmed Amount:

The total project programming amount increases from $408,000 to $1,335,494.

Added Notes:

OTC approval was required for the changes with approval expect to occur during their January 2019 meeting.

Projects #9:	~~I-5: Barbur Blvd NB Connection Bridge~~ **OR99W: Barbur Boulevard Northbound Connection Bridge**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20465**	MTIP ID Number:	70998
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: ODOT Fix-It SW Bridge plus HB2017 Bridge Seismic • Projected Fund Type: Federal ADVCON (Advance Construction) is being used to program the committed funding for later phase obligation flexibility needs • Type: Bridge - structures • Location: OR-99W • Cross Streets: OR-99W bridge crossing at I-5 • Mile Post Limits: 7.79 to 7.84 • Current Status Code: 1 – Pre-PE obligation activities • Proposed improvements: Paint structure; remove pack rust. Replace rivets and bolts. • STIP Amendment Number: 18-21-2143 • MTIP Amendment Number: JA19-05-JAN		
What is changing?	**AMENDMENT ACTION: COST INCREASE** The Oregon 99 West (Barbur Boulevard) northbound connection bridge over Interstate 5 was built in 1985 and is in satisfactory condition. The portions of the bridge directly over Interstate 5 have painted girders to protect the steel from corrosion. The original paint system is at the end of its service life, with moderate surface corrosion on the lower portions of the girders, and isolated areas where the corrosion has begun to reduce the thickness of the steel. The cost increase for Key 20465 is similar to Key 20702, OR99W SB Ramp to I-5 SB (Capitol Highway Interchange). The initial estimate for preliminary engineering was based on the entire design being done internally. The design of the paint portion of the project will be done by ODOT's Bridge Preservation Unit. The remainder of the project will be designed by a consultant due to ODOT resources being committed to the delivery of other projects. As a result, the engineering costs have increased. Construction costs have increased due to bid prices that are higher than were accounted for when the project was initially programmed; in addition, the costs of the containment for paint removal/paint application and the disposal of hazardous waste were not included in the original project estimate. ODOT is also changing the name of the project because the location mile points are actually for OR99W, not I-5. There are no changes to the project location or scope, just a correction to the name.		

	The net changes to PE and construction result in the following: The PE phase increases by $207,720 and the construction phase increases by $620,972.
Additional Details:	The PE phase increases from $136,000 to 343,720 with the construction phase increasing from $1,533,975 to $2,154,947. The total project cost increases from $1,669,975 to $2,498,667. Funds to address the funding shortfall will come from a combination of the cancellation of K20540 (a Region 5 bridge project), and the removal of bridge scope/funding from K20298.

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
~~NHPP-FAST~~	~~Z001~~	~~2019~~		~~$ 122,033~~				
ADVCON	ACP0	2019		$ 308,420				$ 308,420
~~NHPP-FAST~~	~~Z001~~	~~2020~~					~~$ 1,376,436~~	
ADVCON	ACP0	2020					$ 1,933,634	$ 1,933,634
								$ -
								$ 2,242,054
State Funds								
~~State~~	~~Match~~	~~2019~~		~~$ 13,967~~				
State	Match	2019		$ 35,300				$ 35,300
~~State~~	~~Match~~	~~2020~~					~~$ 157,539~~	
State	Match	2020					$ 221,313	$ 221,313
								$ -
							State Total:	$ 256,613
Local Funds								
								$ -
								$ -
							Local Total	$ -
Phase Totals Before Amend:			$ -	~~$ 136,000~~	$ -	$ -	~~$ 1,533,975~~	$ 1,669,975
Phase Totals After Amend:			$ -	$ 343,720	$ -	$ -	$ 2,154,947	$ 2,498,667
							Year Of Expenditure (YOE):	$ 2,498,667

Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, cost changes for project costing $1 million with a cost change of 20% or greater require a formal amendment. The net cost increase to the project is $828,692 which represents a 49.6 % increase to the project.
Total Programmed Amount:	The total project programming amount increases from $1,669,975 to $2,498,667
Added Notes:	OTC approval was required for the changes with approval expect to occur during their January 2019 meeting.

Projects #10:	~~I-84: Fairview - Marine Drive & Tooth Rock Tunnel~~ **I-84: Fairview - Marine Drive**		
Lead Agency:	**ODOT**		
ODOT Key Number:	**20298**	MTIP ID Number:	70939
Project Description:	Project Snapshot: • Source: ODOT Awarded Project • Funding: • Projected Fund Type: • Type: Highway – Preservation (Resurfacing) • Location: I-84 • Cross Streets: City of Fairview (about NE 223rd Ave) east to Marine Drive • Mile Post Limits: 13.83 to 41.34 total limits on I-84 • Current Status Code: 1 – Pre-PE obligation activities • Proposed improvements: ~~Repave a section of I-84 between Fairview and Marine Dr repaves the Tooth Rock tunnel and installs a full signal upgrade (including ADA) at NE238th Ave. Deck overlay and repair joints on the McCord Creek Bridge (#02193B~~). **Repave a section of I-84 between**		

Fairview and Marine Dr and install a full signal upgrade (including ADA) at NE 238th Ave.

- STIP Amendment Number: 18-21-2043
- MTIP Amendment Number: JA19-05-JAN

What is changing?

AMENDMENT ACTION: SCOPE CHANGE

From the OTC Staff Report:
The Interstate 84 eastbound McCord Creek Bridge was built in 1962. The deck is in poor condition due to cracking, rutting, exposed reinforcement, and pieces of concrete up to three feet in diameter that have separated from the deck. The deck is only 6 ½ inches thick, and the top 1 ½ inches is contaminated with chlorides due to the use of deicing products. Also, the transition from the bridge approach pavement to the bridge itself is not smooth, causing a noticeable impact for drivers. This bridge has required extensive maintenance work to repair the deck and to minimize the impact. A deck overlay for this bridge was added with funding from House Bill 2017.

While the McCord Creek Bridge is within the limits of this Interstate Maintenance Preservation Project, the extensive work needed to address the poor condition of the deck is not really compatible with the other project work. Grinding the approach pavement to address the impact loading will leave a layer of pavement that is too thin to be structurally sound, and rebuilding the approach pavement is also beyond the scope of the other work in the project. Based on the nature of the work required being much more extensive than the other project work, the McCord Creek Bridge should be removed from this project.

The McCord Creek Bridge is being considered for the 2022-2024 STIP and is the top priority bridge project for Region 1. It is within the limits of the Interstate 84: Multnomah Falls – Cascade Locks Interstate Maintenance Preservation Project. The scoping effort will determine the best solution for this bridge, ranging from extensive deck rehabilitation, deck replacement, or perhaps bridge replacement. This bridge will eventually need a seismic retrofit, and it may be most economical to simply replace the bridge instead of doing extensive deck work now, and extensive seismic related work later.

As a result, the project scope is changing as follows:

- The Tooth Rock Tunnel paving work is being removed from the project scope.
- The McCord Creek Bridge work is being removed from the project scope

- The $1,000,000 of HB201 Bridge Seismic funds associated with the McCord Creek Bridge is being relocated to Keys 20465, 20484, and 20702
- The project name changes to now be I-84: Fairview to Marine Drive
- The project description is updated to reflect the scope adjustments.

Additional Details:

As stated above, the removal of the $1,000,000 for the McCord Creek Bridge work decreases the project total from $5,792,148 to $4,792,148

PROJECT FUNDING DETAILS

Fund Type	Fund Code	Year	Planning	Preliminary Engineering	Right of Way	Other (Utility Relocation)	Construction	Total
Federal Funds								
~~NHPP-FAST~~	~~Z001~~	~~2019~~		~~$ 370,660~~				
NHPP-FAST	**Z001**	**2019**		**$ 263,703**				$ 263,703
NHPP	**M001**	**2019**		**$ 106,957**				$ 106,957
~~ADVCON~~	~~ACP0~~	~~2019~~		~~$ 322,770~~				
NHPP-FAST	Z001	2020			$ 2,294			$ 2,294
~~NHPP-FAST~~	~~Z001~~	~~2021~~					~~$ 3,937,110~~	
NHPP-FAST	**Z001**	**2021**					**$ 3,778,971**	$ 3,778,971
NHPP	**M001**	**2021**					**$ 267,394**	$ 267,394
~~ADVCON~~	~~ACP0~~	~~2021~~					~~$ 599,430~~	
								$ -
								$ -
								$ 4,419,319
State Funds								
~~State~~	~~Match~~	~~2019~~		~~$ 31,270~~				
State	**Match**	**2019**		**$ 22,247**				$ 22,247
State	**Match**	**2019**		**$ 9,023**				$ 9,023
~~State~~	~~Match~~	~~2019~~		~~$ 27,230~~				
State	Match	2020			$ 194			$ 194
~~State~~	~~Match~~	~~2021~~					~~$ 450,620~~	
State	**Match**	**2021**					**$ 318,807**	$ 318,807
State	**Match**	**2021**					**$ 22,558**	$ 22,558
~~State~~	~~Match~~	~~2021~~					~~$ 50,570~~	
								$ -
							State Total:	**$ 372,829**
Local Funds								
								$ -
							Local Total	**$ -**
Phase Totals Before Amend:			$ -	~~$ 751,930~~	$ 2,488	$ -	~~$ 5,037,730~~	~~$ 5,792,148~~
Phase Totals After Amend:			$ -	**$ 401,930**	$ 2,488	$ -	**$ 4,387,730**	**$ 4,792,148**
							Year Of Expenditure (YOE):	$ 4,792,148

Why a Formal amendment is required?

Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, majors cope changes require a formal amendment. Note: The cost decrease as a result of the scope change results in a 17.2% change to the project.

Total Programmed Amount:

The total project programming amount decreases from 5,792,148 to $4,792,148

Added Notes:

OTC approval was required for the changes with approval expect to occur during their January 2019 meeting.

Projects #11: ~~FY18 TriMet Prevent Maint (TOD) Fund Exchange)~~

Lead Agency: **TriMet**

ODOT Key Number: **21126** | **MTIP ID Number:** 71020

Project Description:

Project Snapshot:

- Source: Metro RFFA Step I funded project
- Funding: Metro Transit Oriented Development (TOD) program
- Projected Fund Type: Federal STP>200K *Surface Transportation Program – for urban areas greater than 200,000 people)
- Type: Metro TOD program
- Location: Region wide
- Cross Streets: Not Applicable
- Mile Post Limits: Not Applicable
- Current Status Code: Obligated and awarded from TrAMS, but from Key 21262

	• Proposed improvements: Enables the annual Transit Oriented Development (TOD) fund exchange to occur • STIP Amendment Number: TBD • MTIP Amendment Number: JA19-05-JAN
What is changing?	**AMENDMENT ACTION: CANCELED PROJECT** Each year TriMet receives a STP/STBG allocation from Metro in support of Transit Oriented Development (TOD) activities. Metro's Transit-Oriented Development Program strategically invests to help more people live, work and shop in neighborhoods served by high-quality transit. Metro's TOD program stimulates private investment by helping offset the higher costs of compact development. TOD program investments totaling $16 million have leveraged more than $697 million in private development activity across 45 completed TOD projects. **Program Accomplishments FY 2017-18 | Total** **Trips** 15,094 | 948,989 Transit-oriented development creates places for people to live and work near high quality transit. Each year, over 900,000 more travel trips are made by transit, rather than by car, as a result of TOD program supported projects. **Residential Units** 77 | 3,670 TOD projects increase housing affordability by increasing the supply of housing in areas with lower commuting costs. To date, the TOD program has supported construction of approximately 3,600 housing units. Of these, 781 are set aside for households earning less than the area medium income. Over 850 additional income-restricted units are planned or under construction. **Commercial space** 2,000 | 520,213 Developing retail, restaurants and offices in transit served areas enlivens neighborhoods and reduces commuting costs. Mixed-use TOD projects completed to date include 194,780 square feet of retail and 327,433 square feet of office and other commercial space. **Acres protected** 12 | 593 All of the TOD projects completed to date required only 59 acres of land compared to the 590 acres that would be needed to develop these projects in areas without transit. Compact development requires less taxpayer funded infrastructure to serve, reduces commuting costs, and helps preserve agricultural and natural areas. Key 21126 is a duplicate project to Key 21262. TriMet obligated and received their FFY 2018 TOD funds through Key 21262. Key 21126 appears was added late during the 2018 MTIP when Key 21262 was inadvertently overlooked. During the FY 2018 End-of-Year Project Phase Slips Review, Key 21126 was identified as a duplicate. It is being removed from the MTIP now to avoid any possible double counting of STP find programming.
Additional Details:	There was insufficient time to complete a formal amendment during September 2018 and delete Key 21126 from the MTIP. The project had to be carried over into FY 2019 where it now can be deleted.
Why a Formal amendment is required?	Per the FHWA/FTA/ODOT/MPO STIP and MTIP Amendment Matrix, canceling a project from the MTIP requires a formal amendment.
Total Programmed Amount:	The total project programming amount increases from $3,461,176 to $0
Added Notes:	Metro Council approval is required to complete the project cancellation from the MTIP. Approval is expected to occur during the Council's February 7, 2019 meeting.

Note: The Amendment Matrix located on the next page is included as a reference for the rules and justifications governing Formal Amendments and Administrative Modifications to the MTIP that the MPOs and ODOT must follow.

METRO REQUIRED PROJECT AMENDMENT REVIEWS

In accordance with 23 CFR 450.316-328, Metro is responsible for reviewing and ensuring MTIP amendments comply with all federal programming requirements. Each project and their requested changes are evaluated against multiple MTIP programming review factors that originate from 23 CFR 450.316-328. The programming factors include:

ODOT-FTA-FHWA Amendment Matrix
Type of Change
FULL AMENDMENTS
1. Adding or cancelling a federally funded, and regionally significant project to the STIP and state funded projects which will potentially be federalized
2. Major change in project scope. Major scope change includes: • Change in project termini - greater than .25 mile in any direction • Changes to the approved environmental footprint • Impacts to AQ conformity • Adding capacity per FHWA Standards • Adding or deleting worktype
3. Changes in Fiscal Constraint by the following criteria: • FHWA project cost increase/decrease: • Projects under $500K – increase/decrease over 50% • Projects $500K to $1M – increase/decrease over 30% • Projects $1M and over – increase/decrease over 20% • All FTA project changes – increase/decrease over 30%
4. Adding an emergency relief permanent repair project that involves substantial change in function and location.
ADMINISTRATIVE/TECHNICAL ADJUSTMENTS
1. Advancing or Slipping an approved project/phase within the current STIP (If slipping outside current STIP, see Full Amendments #2)
2. Adding or deleting any phase (except CN) of an approved project below Full Amendment #3
3. Combining two or more approved projects into one or splitting an approved project into two or more, or splitting part of an approved project to a new one.
4. Splitting a new project out of an approved program-specific pool of funds (but not reserves for future projects) or adding funds to an existing project from a bucket or reserve if the project was selected through a specific process (i.e. ARTS, Local Bridge...)
5. Minor technical corrections to make the printed STIP consistent with prior approvals, such as typos or missing data.
6. Changing name of project due to change in scope, combining or splitting of projects, or to better conform to naming convention. (For major change in scope, see Full Amendments #2)
7. Adding a temporary emergency repair and relief project that does not involve substantial change in function and location.

- Verification as required to programmed in the MTIP:
  - Awarded federal funds and is considered a transportation project
  - Identified as a regionally significant project.
  - Identified on and impacts Metro transportation modeling networks.
  - Requires any sort of federal approvals which the MTIP is involved.
- Passes fiscal constraint verification:
  - Project eligibility for the use of the funds
  - Proof and verification of funding commitment
  - Requires the MPO to establish a documented process proving MTIP programming does not exceed the allocated funding for each year of the four year MTIP and for all funds identified in the MTIP.
- Passes the RTP consistency review:
  - Identified in the current approved constrained RTP either as a stand- alone project or in an approved project grouping bucket
  - RTP project cost consistent with requested programming amount in the MTIP
  - If a capacity enhancing project – is identified in the approved Metro modeling network
- Satisfies RTP goals and strategies consistency: Meets one or more goals or strategies identified in the current RTP
- Determined the project is eligible to be added to the MTIP, or can be legally amended as required without violating provisions of 23 CFR450.300-338 either as a formal Amendment or administrative modification:
  - Does not violate supplemental directive guidance from FHWA/FTA's approved Amendment Matrix.
  - Adheres to conditions and limitation for completing technical corrections, administrative modifications, or formal amendments in the MTIP.
  - Is eligible for special programming exceptions periodically negotiated with USDOT as well.
  - Programming determined to be reasonable of phase obligation timing and is consistent with project delivery schedule timing.

- MPO responsibilities completion:
  - Completion of the required 30 day Public Notification period:
  - Project monitoring, fund obligations, and expenditure of allocated funds in a timely fashion.
  - Acting on behalf of USDOT to provide the required forum and complete necessary discussions of proposed transportation improvements/strategies throughout the MPO.

APPROVAL STEPS AND TIMING

Metro's approval process for formal amendment includes multiple steps. The required approvals for the January 2019 Formal MTIP amendment will include the following:

Action	Target Date
Initiate the required 30-day public notification process…….	January 2, 2019
TPAC notification and approval recommendation……	January 11, 2019
JPACT approval and recommendation to Council……	**January 17, 2019***
Completion of public notification process……	January 31, 2019
Metro Council approval……	February 7, 2019**

Notes:

* If any notable comments are received during the public comment period requiring follow-on discussions, they will be addressed by JPACT.

** This formal amendment is processing the ODOT projects concurrently with OTC required approval. ODOT projects that require OTC approval are scheduled for their January 17, 2019 meeting. The applicable projects are on the OTC consent calendar and are expected to be approved without issue. However, if OTC approval is not received, the applicable projects will be removed from the January 2019 Formal Amendment Bundle.

USDOT Approval Steps:

Action	Target Date
Metro development of amendment narrative package ……	February 11, 2019
Amendment bundle submission to ODOT for review……..	February 12, 2019
Submission of the final amendment package to USDOT……..	February 12, 2019
ODOT clarification and approval……..	Late February, 2019
USDOT clarification and final amendment approval……..	Early to mid-March, 2019

ANALYSIS/INFORMATION

1. **Known Opposition:** None known at this time.
2. **Legal Antecedents:** Amends the 2018-2021 Metropolitan Transportation Improvement Program adopted by Metro Council Resolution 17-4817 on July 27, 2017 (For The Purpose of Adopting the Metropolitan Transportation Improvement Program for the Portland Metropolitan Area).
3. **Anticipated Effects:** Enables the projects to obligate and expend awarded federal funds.
4. **Metro Budget Impacts:** None to Metro

RECOMMENDED ACTION:

TPAC recommends the approval of Resolution 19-4961.

- TPAC approval 1/11/2019.

Attachments

1. Project Location Maps
2. OTC Letters