

# Puget Sound Gateway Project

SR 509, I-5 and SR 167 Funding and Phasing Study: Strategic Corridor Design Review



## Appendix B: Study Approach

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## INTRODUCTION

The SR 509/I-5/SR 167 Strategic Corridor Design Review followed a four-stage approach focused on elements unique to this effort to review these three originally separate baseline projects. The four stages were: 1) Review and Understand with Purpose, 2) Brainstorm and Assess against Purpose, 3) Develop and Align with Consistency, and 4) Refine and Report with Confidence. Stage 1, Review and Understand with Purpose included the collection and dissemination of design documents and reports for each separate project to the study team. These materials and discussions between WSDOT and consultant team members were used to develop a common understanding of the project purpose, goals and priorities as well as the information developed to date. Stage 2, Brainstorm and Assess against Purpose, focused on evaluating how the purpose and goals can be achieved, bringing in new ideas. This stage was built on an initial design workshop. Stage 3, Develop and Align with Consistency, developed the brainstorm ideas, and verified compliance with the project purpose, goal and priorities. This stage included stakeholder meetings, culminating in a second design workshop. The final stage, Refine and Report with Confidence gathered the information and created a consistent package to report the findings and support further project development.

During Stage 2, in an effort to further focus and unify the effort, WSDOT named the combined SR 167/ I-5/ SR 509 projects the Puget Sound Gateway Project, or in short form, the Gateway Project.

### STAGE 1: REVIEW AND UNDERSTAND WITH PURPOSE

The review team conducted a thorough review of available project information. This review focused on the design development, environmental documentation, the cost estimates for the full baseline projects, which also included the initial construction phases for the Puget Sound Gateway corridors. This stage also served to introduce the review team to the corridor stakeholders and gain an understanding of WSDOT and stakeholder goals and priorities. Focus and direction obtained in this stage was used to set the agenda and establish the needed outcomes for Stage 2.

### STAGE 2: BRAINSTORM AND ASSESS AGAINST PURPOSE

In Stage 2, the review team developed and evaluated alternatives that were consistent with the purpose, goals, and priorities of the project by refining existing scope, phasing and packaging concepts. A variety of new ideas based on existing design information were developed in a workshop format that brought together knowledgeable WSDOT staff and subject matter experts.

Starting with the baseline configurations and data, the review team kicked off the corridor design review with an Initial Design Workshop in December 2012. The goal of the workshop was to identify changes to each of the three baseline projects that could reduce the initial construction cost and support phased or scalable funding scenarios. The team considered the baseline projects from two perspectives: “blank slate” and fiscally constrained to identify possible construction phasing and alternative configurations that were consistent with project goals and reduce costs. The “blank slate” review set aside the constraints previously identified while the constrained

review reflected the major constraints that heavily influence the project configurations established prior to this review effort.

During the initial design workshop, the team identified approximately 90 alternatives, and grouped them into five categories: optimizations; phasing, revenue, stakeholders, and procurement. The optimization and phasing alternatives were ranked by how well they supported project goals. The 20 highest-ranked alternatives were carried forward for further screening. The revenue, stakeholders, and procurement alternatives were held for further evaluation in Stage 3.

The review team identified opportunities to provide a better balance between operational benefits and costs. Experts in construction phasing and design options developed alternatives to the scope, phasing and packaging. Workshops participants qualitatively evaluated the alternatives and developed consensus on alternatives would be further investigated after the initial workshop. The initial workshop is documented in Final Report Appendix C, Initial Design Workshop Summary.

### **STAGE 3: DEVELOP AND ALIGN WITH CONSISTENCY**

After the initial workshop, the WSDOT and consultant review team narrowed down the alternatives further by qualitatively evaluating each alternative for conformance with the purpose and goals of the project. This screening also ranked the alternatives by the approximate cost savings. The number of alternatives was narrowed down to five phased alternatives that allowed implementation with initial lower investment levels up to a final phase that provided all or close to all of each full baseline project. The most viable alternatives were assembled into investment level packages. Consistency across project corridors and design alternatives was achieved through close coordination among the discipline leads responsible for evaluation of all three corridors.

The investment level packages and cost estimates were the basis for review team evaluation and refinement at the second design workshop (documented in Final report Appendix D, Second Design Workshop Summary). In addition to further design refinement, the workshop presented alternative delivery and financing options, and preliminary results of traffic and revenue forecast updates. Initial reviews of a range of toll revenues provided part of the picture to allow the review team to compare the costs of the investment level packages against funding sources including new funding legislation, stakeholder contributions, and toll revenues. Updated traffic forecasts allowed confirmation of the key project assumption that tolling would manage traffic demand and allowing phased construction of less than the full baseline projects. Stage 3 included meetings with project stakeholders to obtain more direct input on goals and objectives, and feedback on the current alternatives (see Appendix O for stakeholder meeting materials). Meetings with project stakeholders were held in March 2013. As a direct outcome of the design workshops and design stakeholder meetings, the project team assembled the Puget Sound Gateway Project package of phased alternatives for SR 167, I-5 and SR 509.

In addition to the two design workshops summaries, design development background and recommendations are available in these Final Report appendices:

- Appendix E: Roadway Summary
- Appendix F: Stormwater Summary
- Appendix G: Structures Summary

## **STAGE 4: REFINE AND REPORT WITH CONFIDENCE**

Entering Stage 4, the Puget Sound Gateway project elements were selected, and final design and estimate revisions were prepared. The goal of this stage was to close-out design, finish estimating, incorporate the traffic and revenue findings, and produce a final report summarizing how the Gateway project phasing addressed the project purpose, goals, and priorities.

The approach to the final report is based on the options being forwarded are consistent with the project's purpose and the stakeholder's values, goals, and objectives. This is achieved by communication with, and feedback from the stakeholders throughout the study, using a consistent basis of cost estimating, and using current traffic and revenue forecast parameters consistent with other current projects.

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