



Active Transportation Program

2025 ATP Cycle 7

Project Study Report (PSR) Equivalent Workshop

December 5, 2023



Presentation Outline

- ATP Background
- PSR-Equivalent Purpose
- PSR-Equivalent Definition and Requirements
- Engineer's Checklist (See slide #23)
- Non-Infrastructure
- Plans
- Active Transportation Resource Center (ATRC)

ATP Background





ATP Background: Goals

"The ATP goals include increasing proportion of walking and biking trips, increasing safety and mobility, reducing greenhouse gas emissions, enhancing public health, ensuring disadvantaged communities share benefits, and providing a broad spectrum of projects to benefit many types of active transportation users."



ATP Background: Project Types

The ATP has five basic eligible project types

Infrastructure

Long-term capital projects that will further the program goals

Non-Infrastructure

Education and encouragement activities that further the program goals

Plans

The development of a community wide bicycle, pedestrian, safe routes to school, or active transportation plan in a disadvantaged community

Combination

Infrastructure & Non-Infrastructure together

Quick-Build

Interim capital (infrastructure) projects that are built with durable, low-cost materials, and last one to five years



ATP Application Types

- **Small Infrastructure/Combo**
 - Total project cost \$250K-\$3.5 million
- **Medium Infrastructure /Combo**
 - Total project cost \$3.5-\$10 million
- **Large Infrastructure/Combo**
 - \$10 million+
- **Quick Build**
 - Any cost. Infrastructure project. Must be stand alone, cannot be combined with any other application type
- **Non-Infrastructure**
 - Any cost. Can be stand alone, or combined with an infrastructure project
- **Plans**
 - Any cost. Must be stand alone, cannot be combined with any other application type

Application Scoring: PSR-Equivalent Topics

Scoring Topic	Large Inf. /I + NI	Medium Inf. /I + NI	Small Inf. /I + NI	Plan	Non-Infrastructure Only
Benefits to Disadvantaged Communities (DAC)	10	10	10	30	10
Need	38	40	52	20	40
Safety	20	25	25		10
Public Participation & Planning	10	10	10	25	15
Scope and Plan Layout Consistency and Cost Effectiveness	7				
Scope and Plan Layout Consistency		5	3		10
Context Sensitive & Innovation	5	5			5
Transformative Projects	5				
Evaluation and Sustainability					10
Leveraging	5	5			
Implementation & Plan Development				25	
Corps	(0 or -5)	(0 or -5)	(0 or -5)		(0 or -5)
Past Performance	0 to -10	0 to -10	0 to -10	0 to -10	0 to -10
Total	100	100	100	100	100

Questions?



PSR Equivalent Purpose





PSR-Equivalent Purpose

Why do we need a PSR-Equivalent?

1	The application serves as the PSR-equivalent. The scope in the application at the time of programming is the approved project scope
2	Necessary to verify scope, schedule and estimated cost
3	Necessary to verify deliverability and constructability
4	CTC's ATP guidelines state that a new infrastructure project will not be programmed without a PSR-equivalent

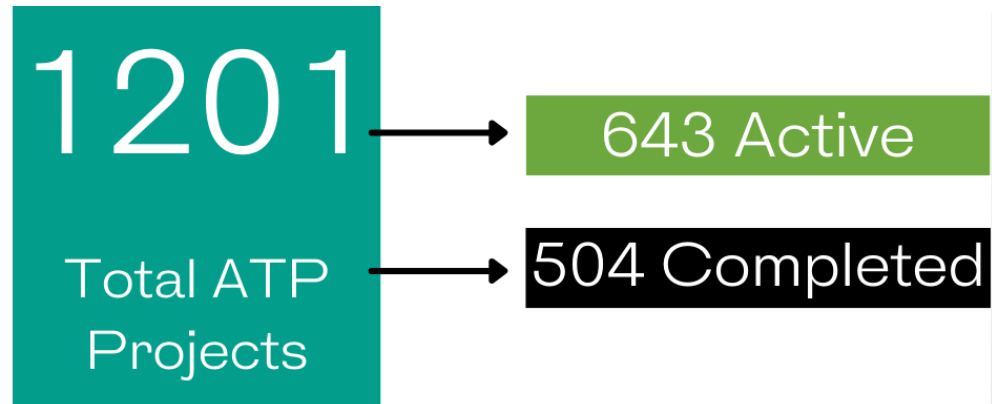


PSR-Equivalent Purpose

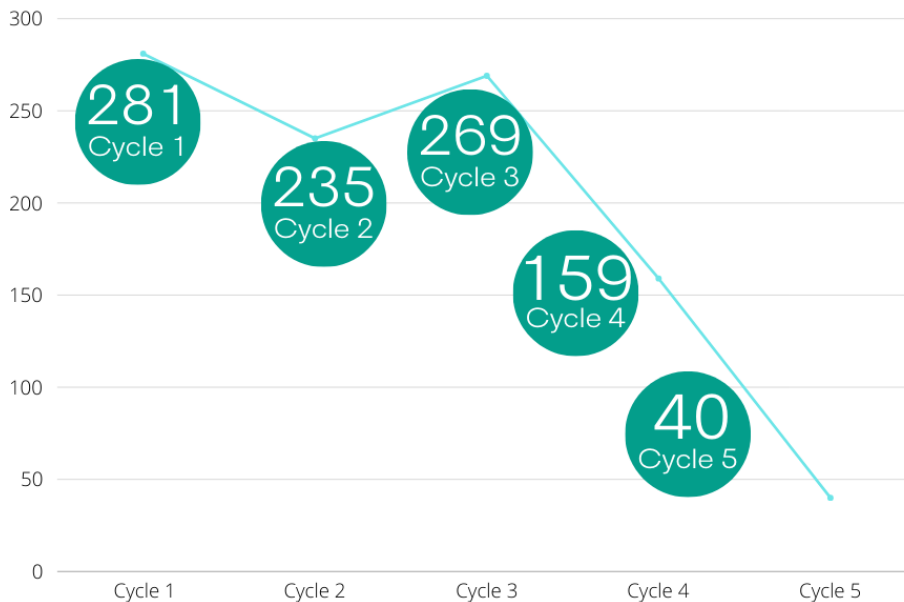
Important Note:

PSRs and PSR-equivalents vary in complexity and detail, however the minimum acceptable level for ATP projects enables the reviewers to verify that the plans/layouts, schedule, and estimated cost of the project are consistent with the written scope and narrative questions as evaluated (what the application is awarded points for.)

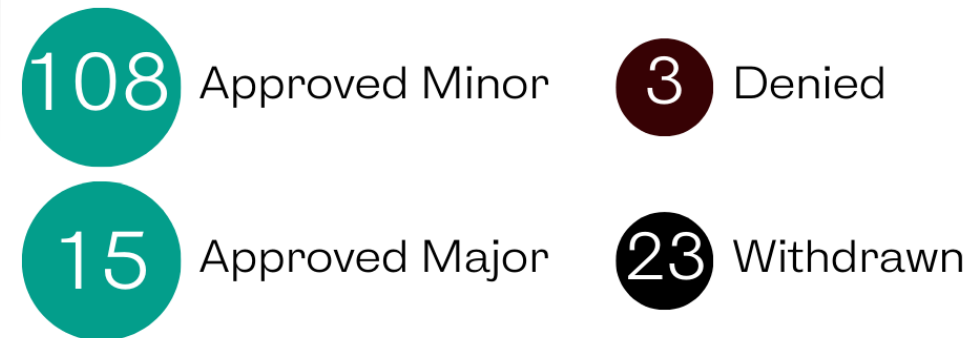
PSR-Equivalent Purpose



Number of Time Extensions



Number of Scope Changes



Questions?

PSR- Equivalent Definition and Requirements





PSR-Equivalent Definition and Requirements

What is a PSR/PSR-Equivalent?

- Project Study Reports and Project Study Report Equivalents are engineering reports used to document agreement on the scope, schedule, and estimated cost of a project so that the project can be considered for inclusion in a future programming document.
- A feasibility study is not an appropriate programming document. The project scope must be identified and defined.
- Quick-build projects do not require the same level of detail to allow for flexibility during the engagement process.

PSR-Equivalent Definition and Requirements

According to the Adopted PSR Guidelines, a PSR Equivalent Must Consider:

- Consistency with statewide, regional and local planning
- Potential environmental issues, including mitigation requirements or hazardous waste



PSR-Equivalent Definition and Requirements

The PSR Guidelines also state that a PSR equivalent must include at a minimum:

Narrative

- Need and Purpose
- Background and project history
- Discussion of alternative(s) that satisfy project need and purpose, including project costs

Cost/Schedule

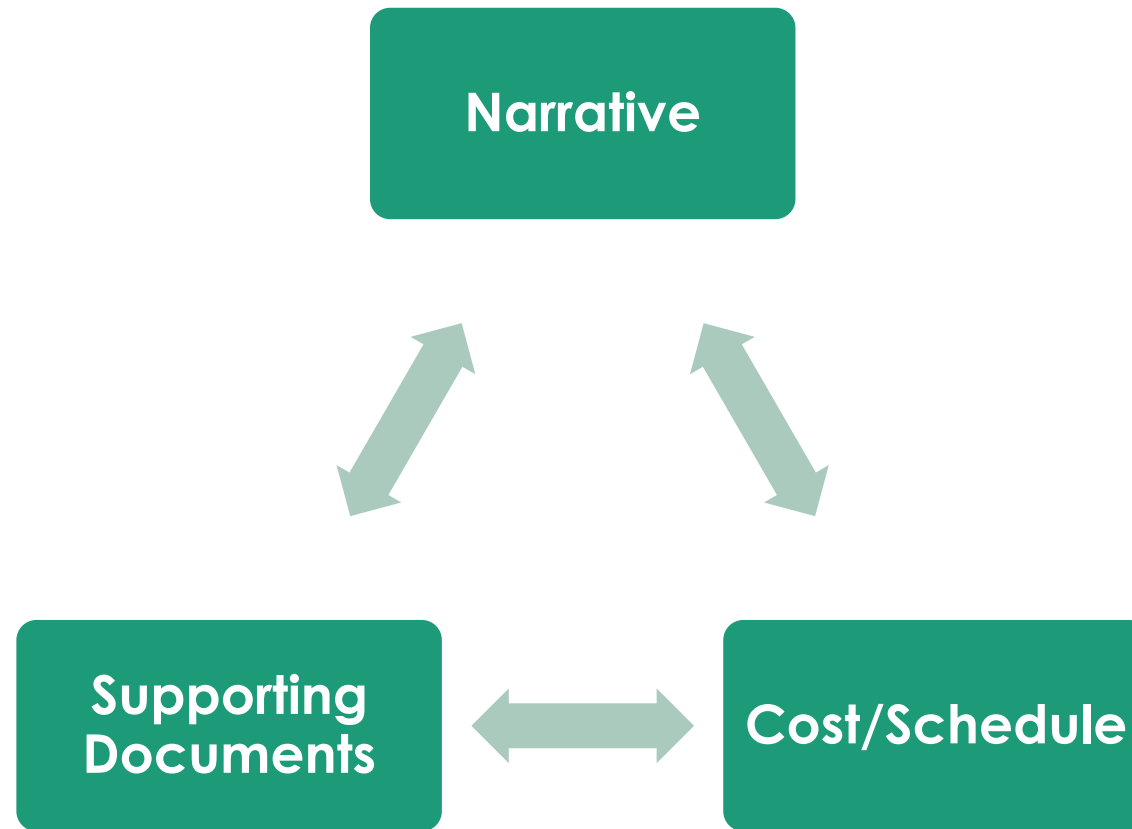
- Project cost estimate:
 - Include project costs for Project Approval and Environmental Document (PA&ED) , Plans, Specifications and Estimates (PS&E) , Right of Way (R/W), and Construction, construction management and engineering (CON) phases
- Project Programming Request (PPR) form with ALL project funding (showing a fully-funded project) with a delivery schedule for all phases

Supporting Documents

- Maps, plan layouts and cross-sections that support the project description

PSR-Equivalent Definition and Requirements

Scope in the narrative must be consistent with the Supporting Documents (maps, plans and cross sections), Cost and Schedule



PSR-Equivalent Definition and Requirements

PSR-Equivalent Elements in the Application

Part A – General Application Questions

- Agency Information
- Project Description
- Project Details
- Project Schedule and Funding (PPR)

Part B – Question #3

- Crash Safety Data, Collision Maps and Countermeasures

Part C – Application Attachments

- Engineer's Checklist (Attachment B)
- Project Location Map (Attachment C)
- Project Layout/Plans and Cross Sections showing existing and proposed conditions (Attachment D)
- Project Estimate (Attachment F)
- Non-Infrastructure Work Plan (Attachment G)
- Plan Scope of Work (Attachment H)
- Additional Attachments (Attachment K)

**Yellow sections
included as a
part of the
Engineer's
Checklist**

Questions?

Engineer's Checklist (Attachment B)



Engineer's Checklist

General Overview

- Required for infrastructure applications
- Used to aid applicants in providing a PSR-equivalent.
- Signed & stamped by the California registered professional engineer (PE) in "responsible charge" of the preparation of the ATP application who ensures the following:
 - All PSR-Equivalent elements are included in the application and attachments
 - The application is free of critical errors and omissions; allowing the application to be accurately evaluated and scored





Engineer's Checklist

The PE should check to ensure the following items are included in the application:

1. Project Location Map (Attachment C)
2. Project Layout/Plans (Attachment D)
3. Cross Sections (Attachment D)
4. Project Estimate (Attachment F)
5. Crash/Safety Data, Collision Map & Countermeasures
 - (see question 3 in ATP Application for reference)
6. Project Schedule, Funding, and Programming Request (Part A5 and A6)
7. Warrant Studies/Guidance, if applicable (Attachment K)
8. Additional Narration and Documentation (Attachment K)

Questions?



1. Project Location Map





1. Project Location Map

The project limits must be clearly depicted in relation to the overall agency boundary

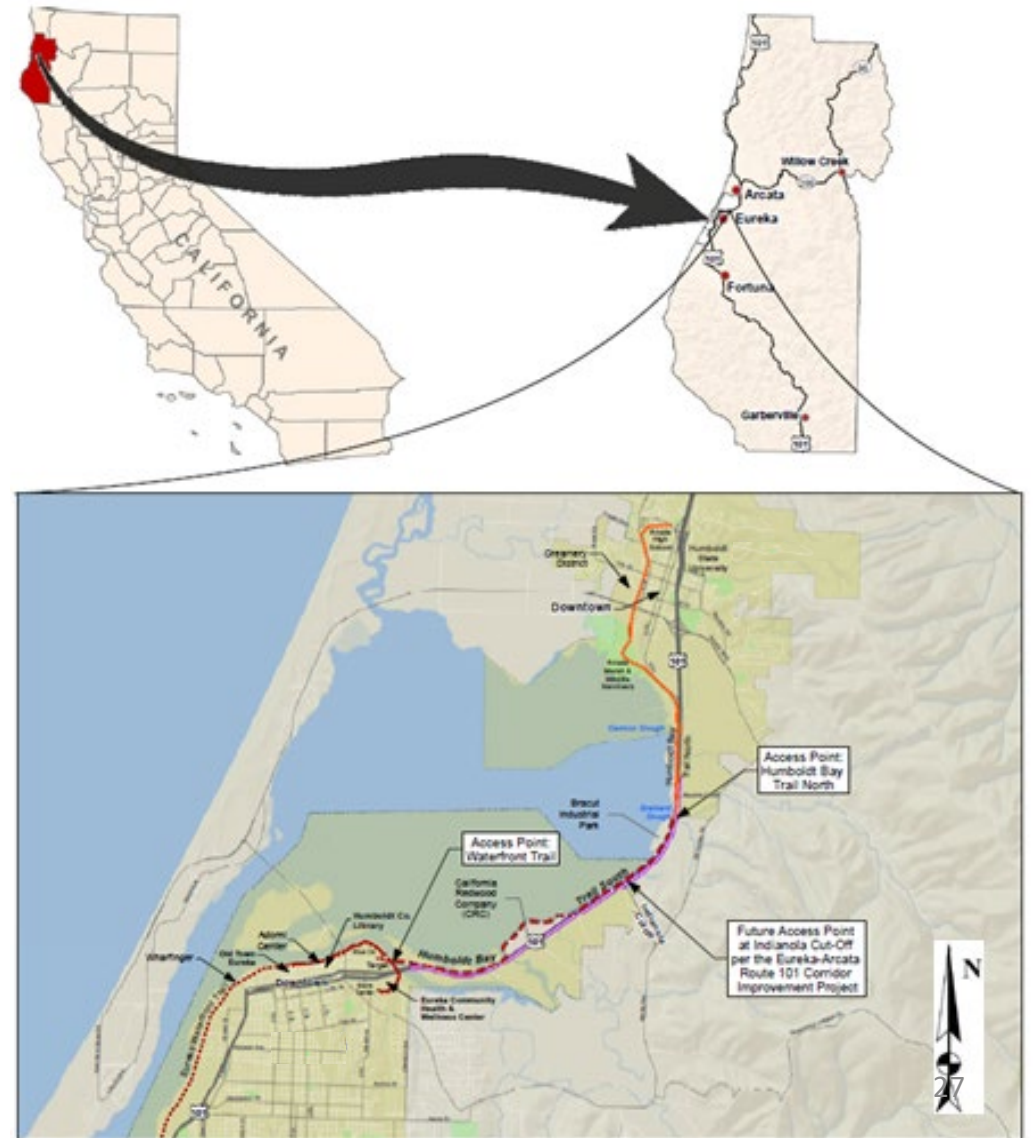
DO THIS!





1. Project Location Map

DO THIS!





This aerial map illustrates the proposed Little River Trail and Bridge project. The trail is shown as a dashed orange line, and the bridge is highlighted in yellow. The map includes labels for Scenic Drive, US 101, Clam Beach Drive, and the Little River. An inset map shows the project location within Oregon and California. A legend at the bottom identifies the trail, bridge, and right-of-way.

Legend:

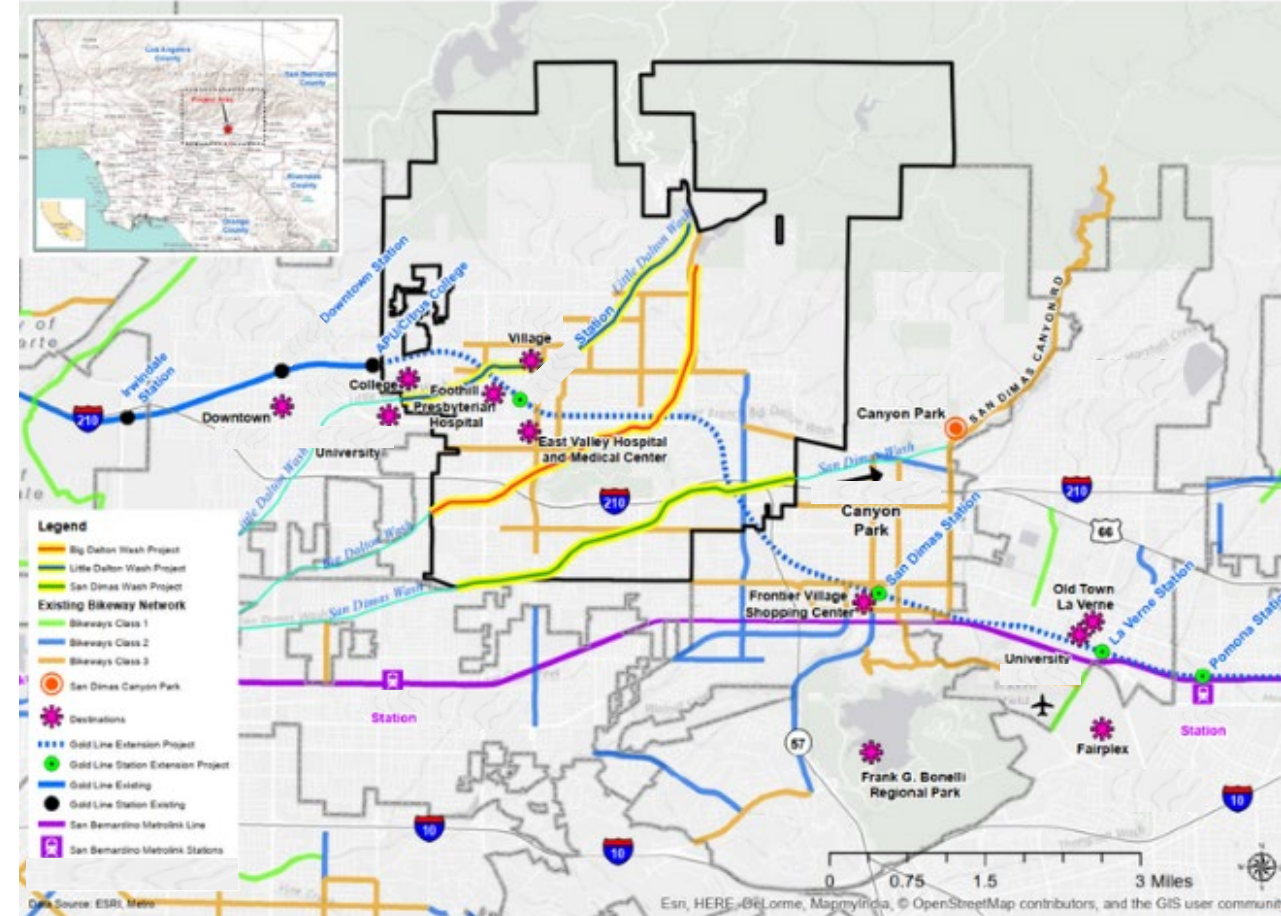
- Proposed Little River Trail
- Proposed Bridge
- CalTrans Right of Way



1. Project Location Map

This map does not show clearly defined boundaries. It shows too much information and does not clearly indicate where the project is located.

DON'T DO THIS!



1. Project Location Map

Lessons Learned

- Show the project location -- Use clear maps, no blurry photos or images
- Clearly show project limits -- identify project boundaries



Questions?

2. Project Layout/Plans





2. Project Layout/ Plans

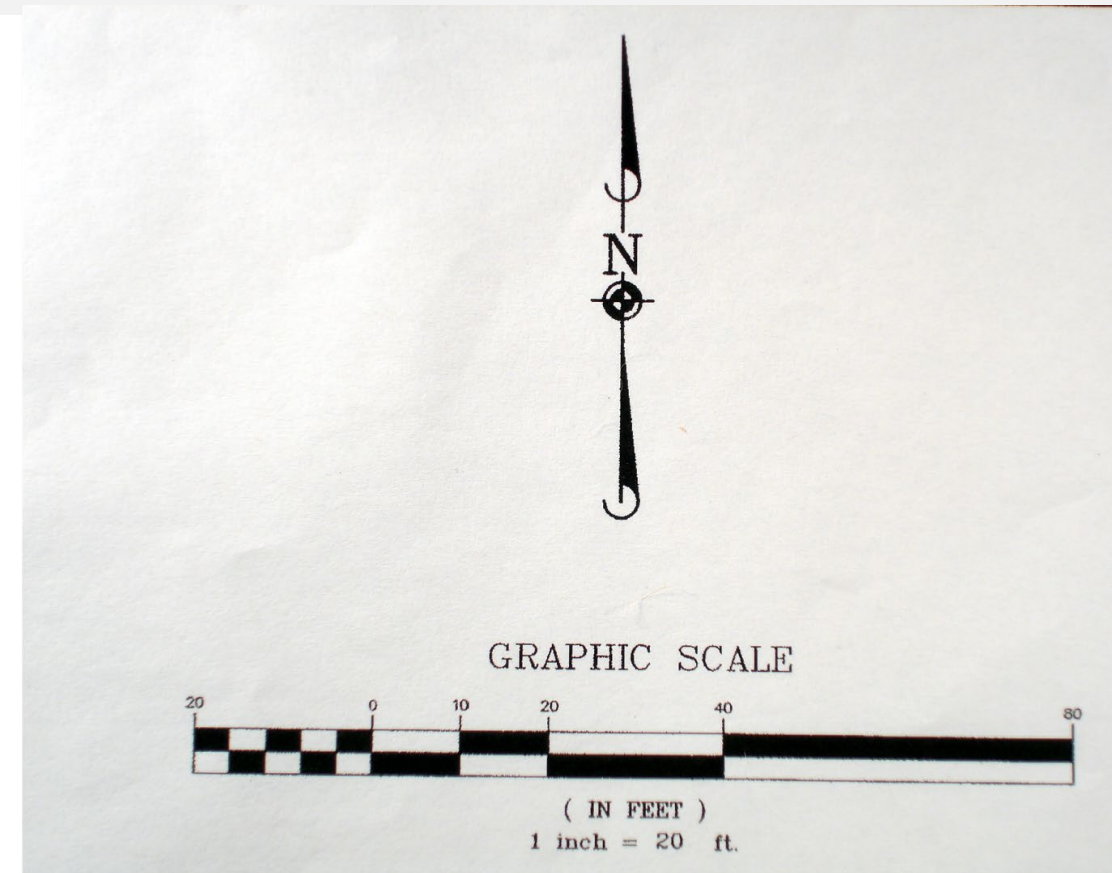
Important Note:

Rule of Thumb –

Using the plans, can you determine what elements are being proposed and where?

2. Project Layout/Plans General Overview

- **Infrastructure Layout/Plans**
 - Show the existing and proposed conditions and features
 - Include a scale and north arrow to reference
 - Show existing and proposed right of way lines (permanent or temporary)
 - Display the full scope of proposed work
 - Allow for visual verification of the limits of each primary element of the project.
 - Use standard design and detailing practices

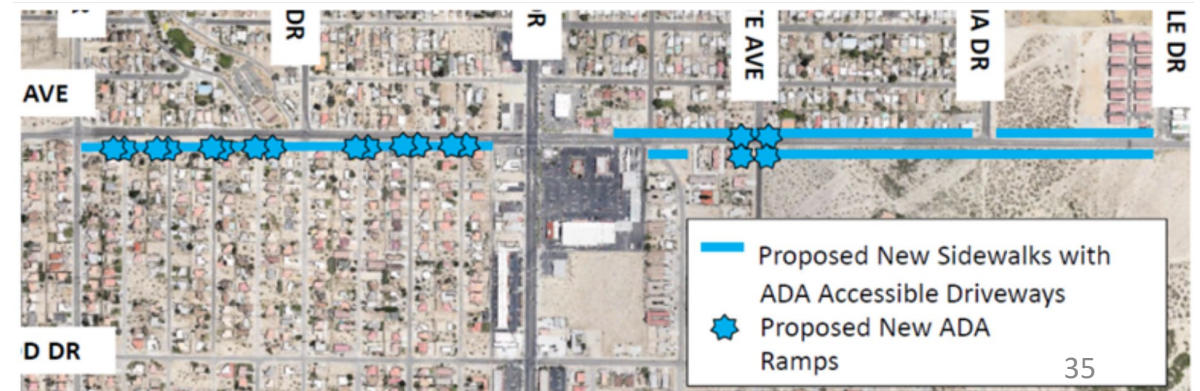
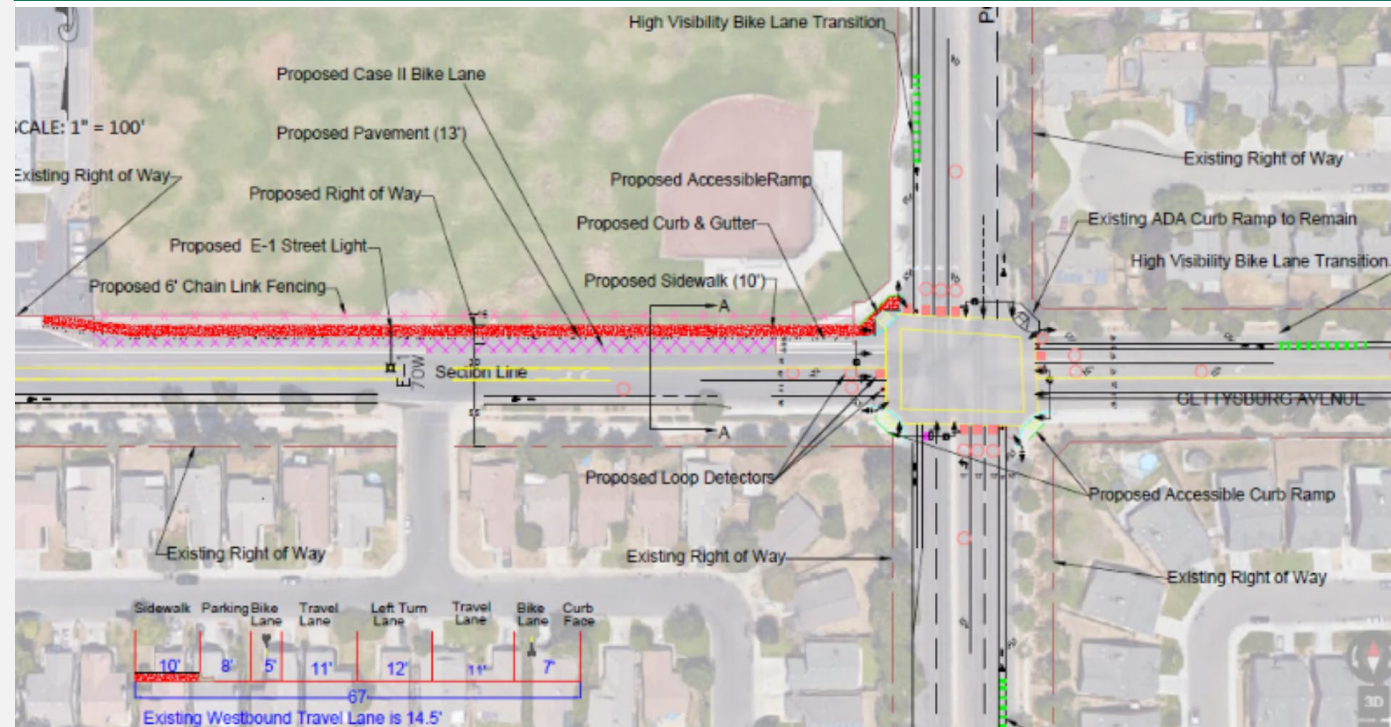


2. Project Layout/Plans

This layout and cross section are clearly showing all the proposed work, and right of way lines.

This is a good example for a simple project, except it needs a cross section and right of way lines.

DO THIS!



DO THIS!



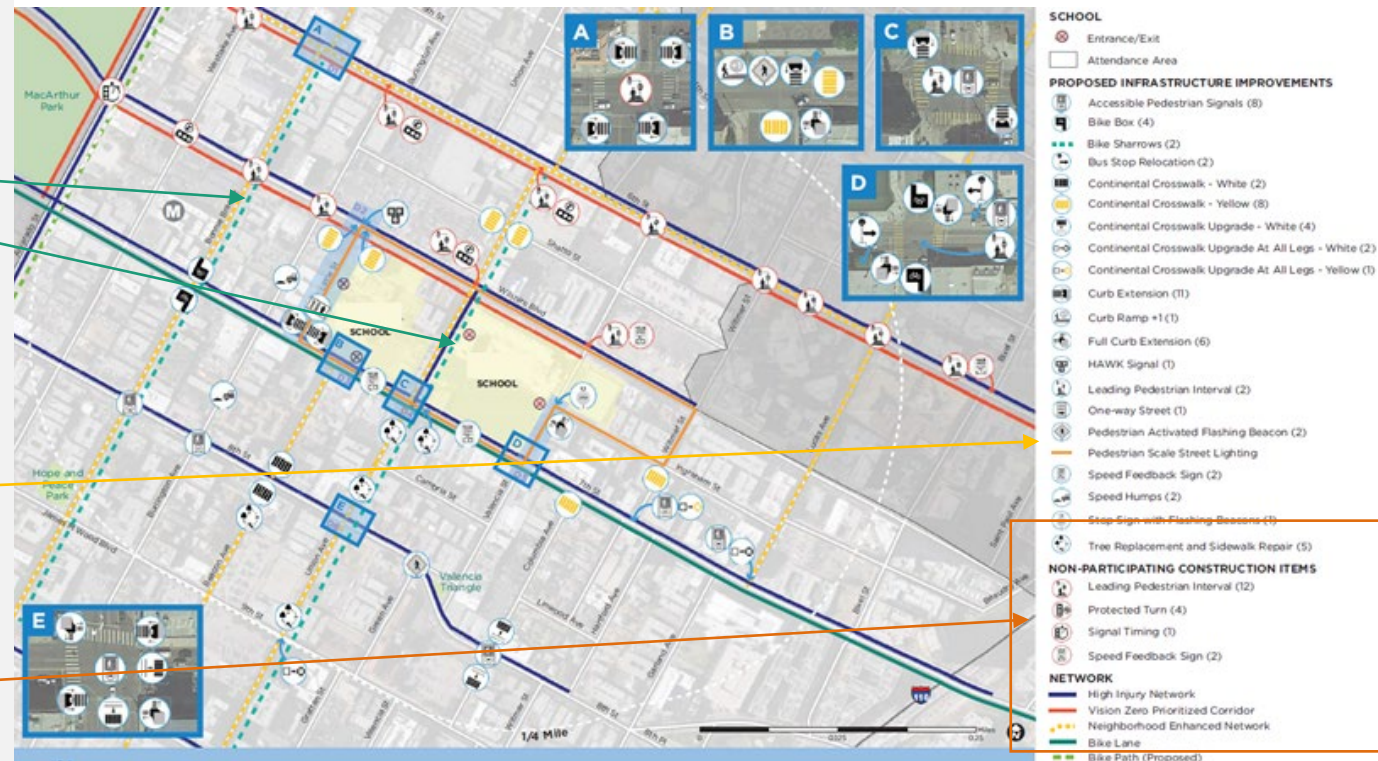
2. Project Layout/Plans

DON'T DO THIS!

The green (Bike Sharrows) and turquoise (Bike path proposed) dashed lines are difficult to differentiate.

A colored line called "Pedestrian Scale Street Lighting" can be used IF the estimate itemizes the # of lights.

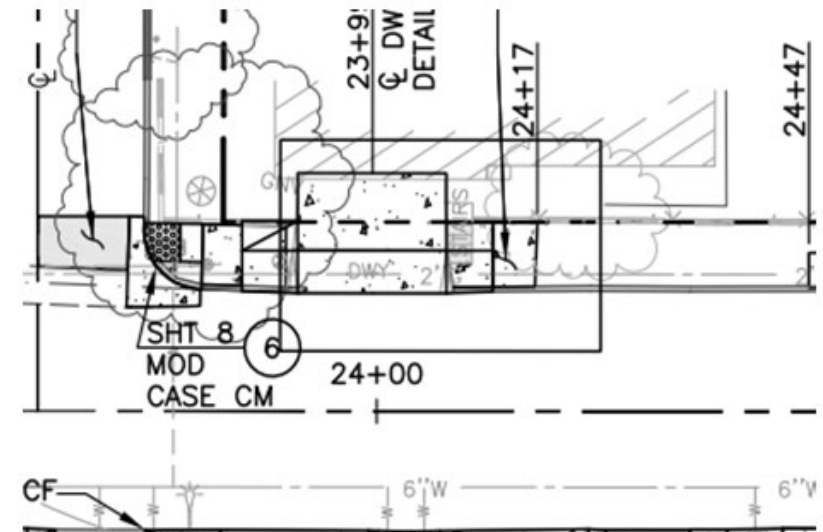
Items that are not part of the project should be dropped out or not mentioned



2. Project Layout/Plans

- The layout shows improvements that will not fit existing conditions.
- The proposed improvements include non-compliant ADA ramps, driveways and sidewalk sections.
- ATP will not fund non-compliant facilities or projects.

DON'T DO THIS!



2. Project Layout/Plans

- This is 5 blocks of sidewalk/ADA improvements.
 - The application included "30%" plans
-
- This project's costs included only \$2,000 in R/W
 - This property will likely not have use of its garage and the owners will have to be compensated for that loss
 - \$697,000 is not an adequate amount of funding for the proposed work

DON'T DO THIS!



Imp. Type	Item No.	Description	Unit	Unit Price	Total Quantity	Total Cost
General	1	Mobilization	LS	\$20,000.00	1	\$20,000
	2	Traffic Control	LS	\$30,000.00	1	\$30,000
	3	Water Pollution Control	LS	\$10,000.00	1	\$10,000
General Improvements Subtotal (\$) =						\$60,000
Street Improvements	4	Unclassified Excavation	SF	\$4.00	25,000	\$100,000
	5	PCC Sidewalk (4" thick)	SF	\$8.00	5,650	\$45,200
	6	PCC Curb & Gutter (6" CF)	LF	\$40.00	200	\$8,000
	7	PCC Curb Ramp	EA	\$4,000.00	13	\$52,000
	8	PCC Curb Ramp with adjacent PCC Cross Gutter Spandrel reconstruction	EA	\$5,000.00	22	\$110,000
	9	PCC Driveway	SF	\$15.00	6,180	\$92,700
	10	Re-grade AC Pavement (4" thick AC Base)	SF	\$5.00	4,000	\$20,000
	11	Adjust Manhole to Finished Grade	EA	\$600.00	3	\$1,800
	12	Adjust Water Valve to Finished Grade	EA	\$300.00	17	\$5,100
	13	Remove Tree	EA	\$2,000.00	2	\$4,000
	14	Traffic Striping	LS	\$8,000.00	1	\$8,000
	15	Water Quality BMPs	LS	\$100,000.00	1	\$100,000
Street Improvements Subtotal (\$) =						\$546,800
TOTALS	Subtotal of Probable Construction Cost =					\$606,800
	15% Contingency =					\$91,020
	Total Probable Construction Cost =					\$697,820

2. Project Layout/Plans

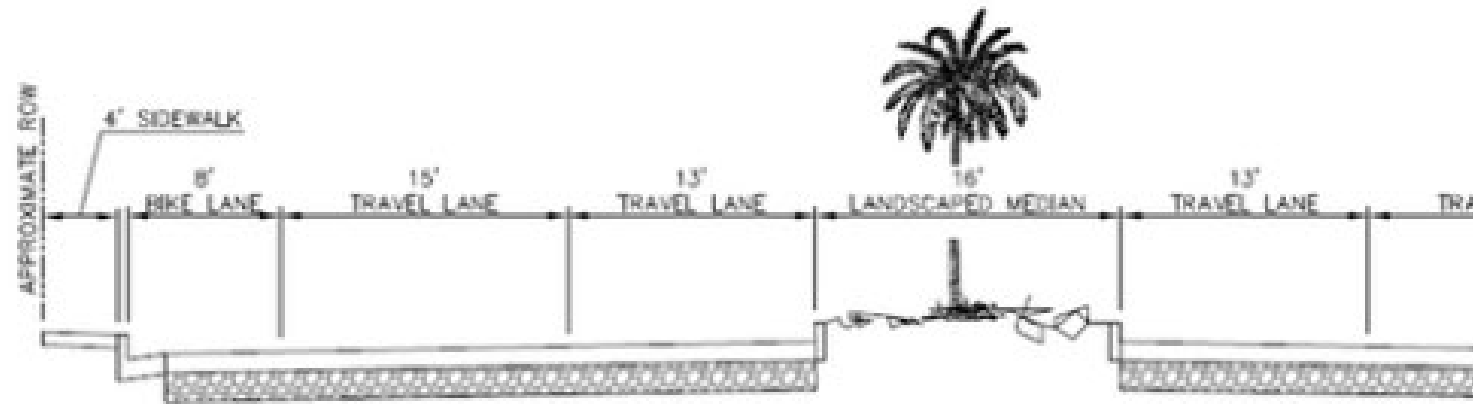
Lessons Learned

- Clearly identify crosswalk locations and legs
 - New crosswalk, enhance existing crosswalk
- Clearly depict the layout and location of trees and utilities
- Clearly identify the type of bike facility (Ex. Class I, II, III, etc.) and the limits
 - Which side of the road are they located on? (One side, both sides)
- Clearly identify sidewalk, curb ramp and curb extension locations
 - Specify locations (which corners, mid-block)
 - New curb ramp, enhance existing curb ramp
- Clearly show the project limits
 - Label all streets
 - Show entire project limits
 - If you have multiple locations, show plans for each location

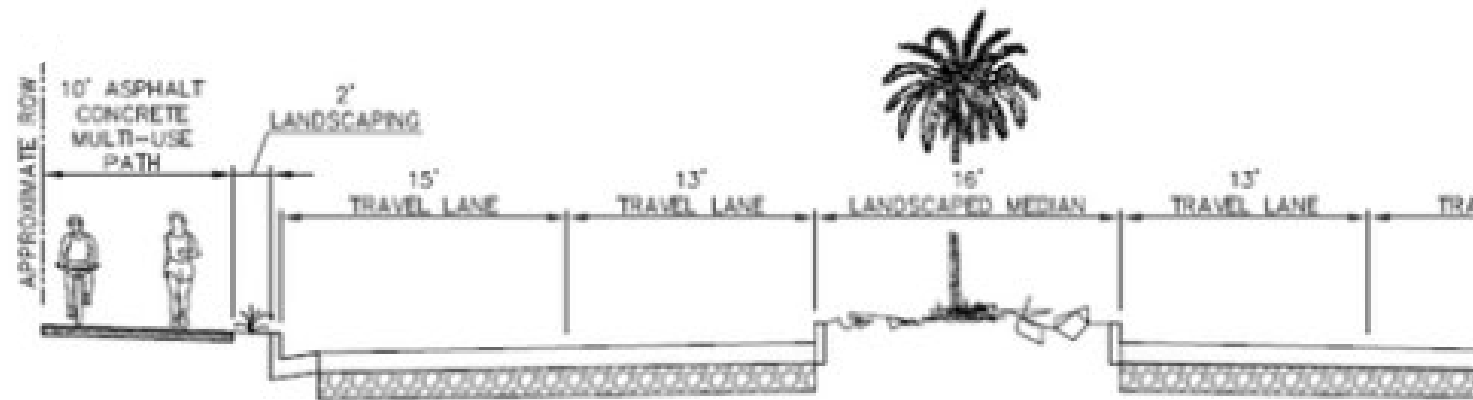


Questions?

3. Cross Section



EXISTING CONDITIONS
NOT TO SCALE

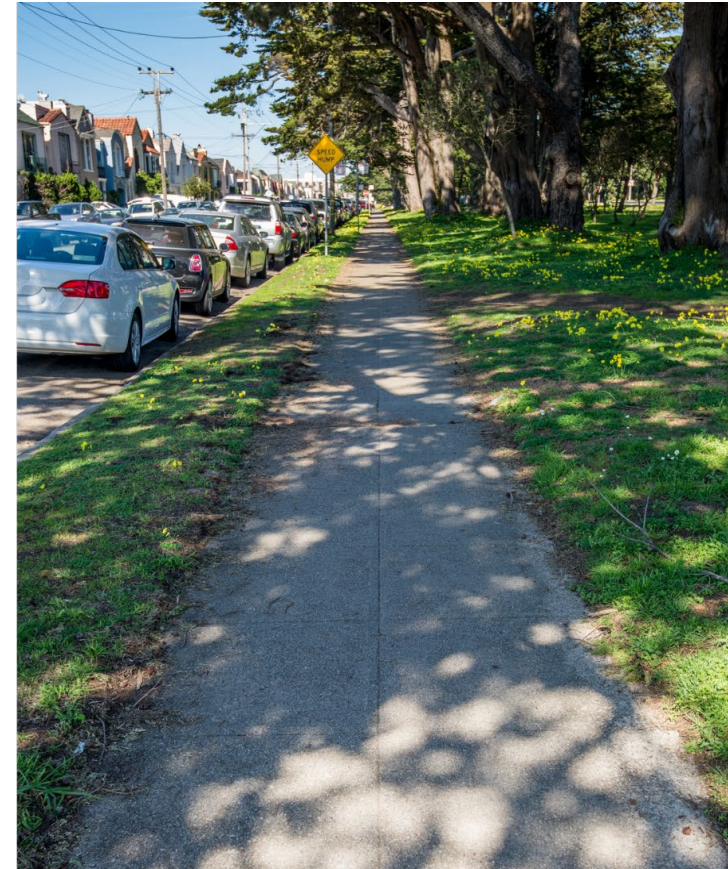


PROPOSED IMPROVEMENTS
NOT TO SCALE

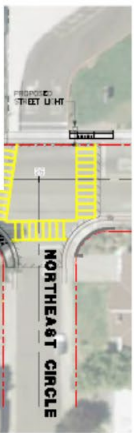
3. Cross Sections

General Overview

- Must show existing and proposed conditions.
 - Horizontal roadway dimensions should be referenced to the alignment line shown on the layout sheets or plans
- Must show and dimension: changes in lane widths, right of way lines, side slopes, etc.
- Must include a cross-section for each segment where the width of improvements, depth of materials or right of way vary significantly from the typical cross section.
 - Cross-sections should be presented from the perspective of looking "up-station" and stationing limits are needed below each section.
- Must show both the width and the depth/thickness for proposed constructed work (paving, pathways, sidewalks, etc.)
 - Thickness of material layers should be shown proportionally.
 - Applicable for roadway, sidewalks and pathway materials.



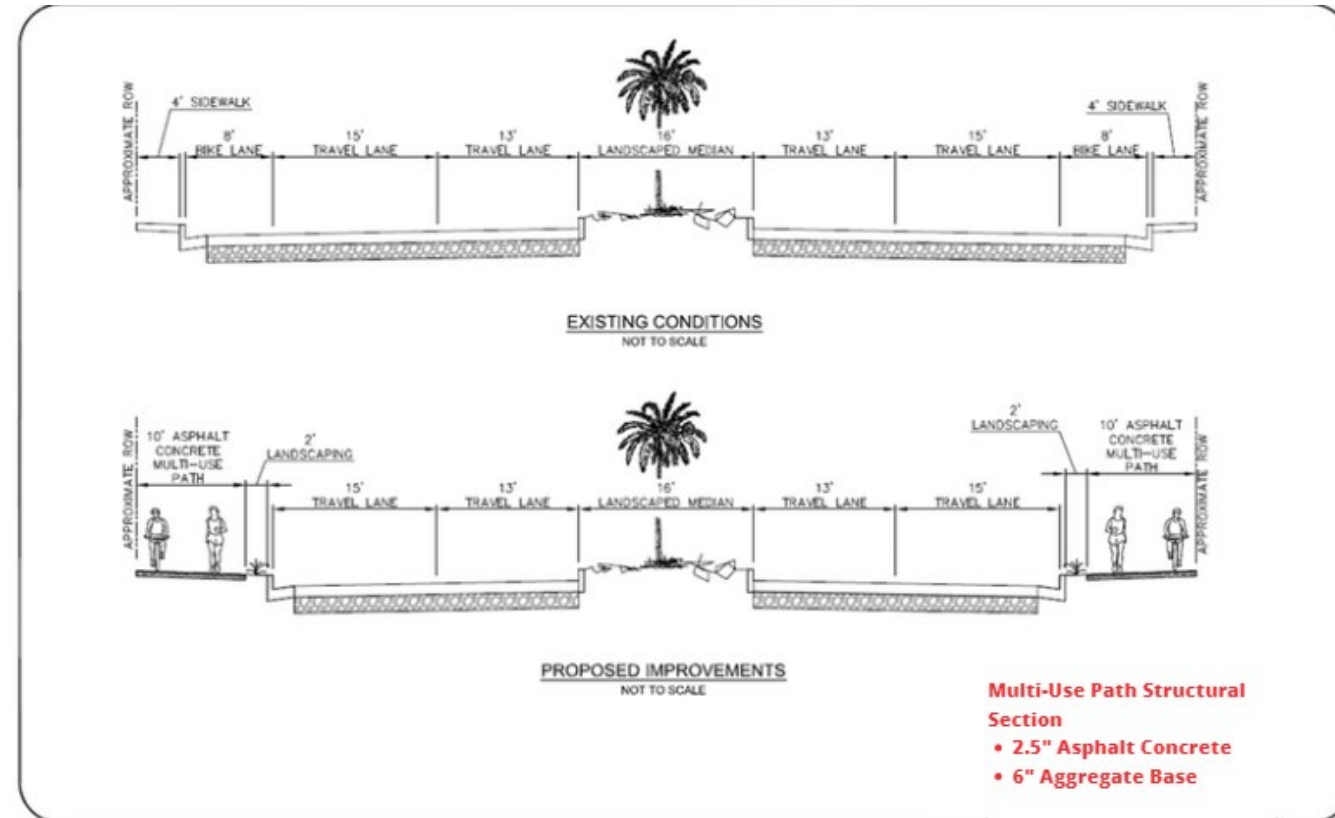
DO THIS!



3. Cross Sections

- If existing widths of lanes or sidewalks are being changed, then the multiple cross sections may be needed to clearly show what work is being proposed.
- For this project, existing and proposed cross sections were used for reference.

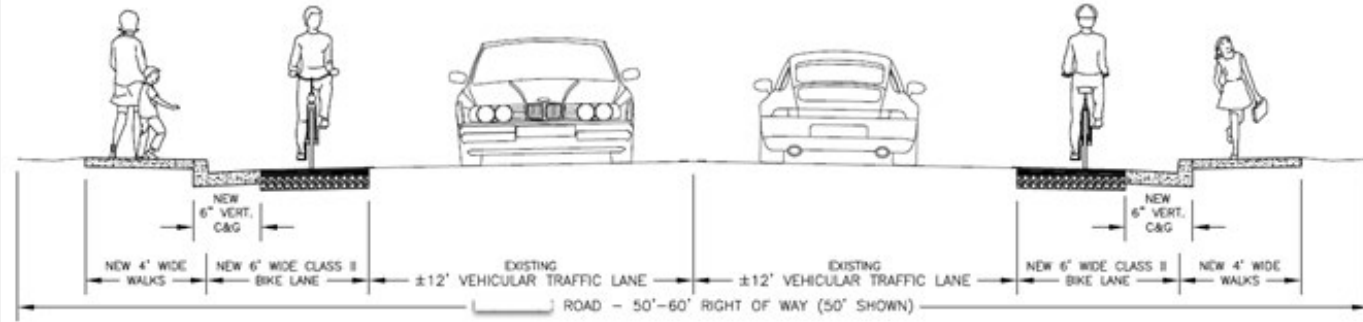
DO THIS!



3. Cross Sections

- This cross section doesn't consider existing conditions.
- The existing conditions in the Google Street View reveals that a retaining wall will be needed to widen the road and add a sidewalk
- Curb and gutter indicates that a storm drain system will be needed in this rural setting. The estimate will need to show a drainage system and other required features.

DON'T DO THIS!



3. Cross Sections

- The cross section needs to be labeled as existing and/or proposed
- Based on Google Street View, the proposed project doesn't look like it will fit within the existing roadway section. The existing roadway width is unknown.
- The existing right of way is unknown. Potential right of way acquisitions or roadway widening are not shown and are not verifiable. If the project requires right of way acquisition, then it needs to be properly reflected in the schedule and estimate.
- The existing AND proposed conditions need to be shown in the cross section.

DON'T DO THIS!



3. Cross Sections

Lessons Learned

- Show the existing conditions and how they will be changed by the project. (widths of lanes, buffers, sidewalks, on-street parking, number of lanes, etc.)
- Existing and proposed conditions can be displayed on the same or separate cross sections (depending on complexity)
- Show proposed structural section, including the depth of materials
- Show right of way lines, existing and proposed
- Show how the proposed improvements will tie into the existing facilities



Questions?

4. Project Estimate



- **Attachment F must be used for ALL infrastructure applications**
- Project elements
 - Should be displayed as separate construction items
 - Based on quantities, utilizing appropriate unit costs including cost escalation
 - Verify allowable Lump Sum Items
- Clearly identify and account for:
 - All non-participating costs
 - CCC/Corps project elements
- Contingency Costs percentages
- Identify all ATP project delivery costs (all phases)
- List R/W acquisition needs (in dollars)
- Include Construction Engineering (CE) costs
- Include Documentation of ATP-Eligible and/or Ineligible Costs (if applicable)

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4. Project Estimate

Show construction items that are partially or fully ATP ineligible

DO THIS!

Engineer's Estimate and Cost Breakdown:											
Engineer's Estimate (for Construction Items Only)						Cost Breakdown					
						ATP Eligible Costs/Items		ATP Ineligible Costs/Items		Corps/CCC to construct	
Item No.	Item	Quantity	Units	Unit Cost	Total Item Cost	%	\$	%	\$	%	\$
General Overhead-Related Construction Items											
1	Mobilization	1	LS	\$127,000.00	\$127,000	41%	\$52,536	59%	\$74,464		
2	Construction Area Signs	1	LS	\$5,000.00	\$5,000	41%	\$2,068	59%	\$2,932		
3	Traffic Control	1	LS	\$25,000.00	\$25,000	41%	\$10,342	59%	\$14,658		
4	Construction Staking	1	LS	\$20,000.00	\$20,000	41%	\$8,273	59%	\$11,727		
5	SWPPP/Erosion Control	1	LS	\$38,000.00	\$38,000	41%	\$15,720	59%	\$22,280		
General Construction Items (non-decorative only)											
6	AC Digouts	600	CY	\$600.00	\$360,000			100%	\$360,000		
7	HMA Paving - Overlay	2000	TON	\$130.00	\$260,000			100%	\$260,000		
8	4" Thermoplastic Striping	10000	LF	\$4.00	\$40,000			100%	\$40,000		
9	Thermoplastic Roadway Pavement	8	EA	\$250.00	\$2,000			100%	\$2,000		
10	Thermoplastic Bike Lane Pavement	20	EA	\$250.00	\$5,000	100%	\$5,000				
11	Thermoplastic Crosswalk Pavement	2	EA	\$2,000.00	\$4,000	100%	\$4,000				
12	Remove 4" Striping	1200	LF	\$2.50	\$3,000	100%	\$3,000				
13	6" Thermoplastic Striping - Bike Lane	9000	LF	\$6.00	\$54,000	100%	\$54,000				
14	Roadside Signs	45	EA	\$650.00	\$29,250	100%	\$29,250				
15	Clearing and Grubbing	25000	SF	\$1.00	\$25,000	100%	\$25,000			100%	\$25,000
16	Sewer Pipe	1000	LF	\$15.00	\$15,000	100%	\$15,000				



4. Project Estimate

Documentation of ATP-Eligible and/or Ineligible Costs

DO THIS!

Documentation of Eligible (Participating) and/or Ineligible (Non-Participating) Costs:

The Engineer's justification for including typical ATP-Ineligible items in the ATP-Eligible column and logic and/or calculations for splitting costs between ATP-Eligible and Ineligible (Non-participating) costs must be documented in this section of the Estimate form.

Separate logic is required for each item which is partly ineligible for ATP funding or is required for the construction of an ineligible item/element of the project.

Item #:	Description of Engineer's Logic: (See example shown in the Instructions)

Instructions (do not attach) Project Cost Estimate Allowable Lump Sum Items (+)

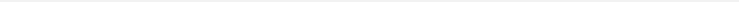
Documentation of Eligible (Participating) and/or Ineligible (Non-Participating) Costs:

The following is an example of how Engineer's can present their logic and calculations for splitting the projects costs between eligible (participating) and ineligible (non-participating) costs.

Example #1 - Pavement Rehabilitation: The roadway paving and base repair needed for the roadway is within the limits of the new bike lanes and motorized lanes. The area within the physical limits of the new bike lanes is estimated to be 3'x300'=900' and the area outside these limits is estimated to be 10'x300'=3,000'. The ATP eligible reimbursement for all costs related to the Pavement Rehabilitation is calculated to be $900/(900+3000) = 23\%$. This split was used for Asphalt Concrete, Aggregate Base, and Excavation.

Do not attach these instructions to the ATP application

Instructions (do not attach) Project Cost Estimate Allowable Lump Sum Items (+)

- 

Engineer's Estimate and Cost Breakdown:											
Engineer's Estimate (for Construction Items Only)						Cost Breakdown					
						ATP Eligible Costs/Items		ATP Ineligible Costs/Items		Corps/CCC to construct	
Item No.	Item	Quantity	Units	Unit Cost	Total Item Cost	%	\$	%	\$	%	\$
General Overhead-Related Construction Items											
1	Mobilization	1	LS	\$127,000.00	\$127,000	41%	\$52,536	59%	\$74,464		
2	Construction Area Signs	1	LS	\$5,000.00	\$5,000	41%	\$2,068	59%	\$2,932		
3	Traffic Control	1	LS	\$25,000.00	\$25,000	41%	\$10,342	59%	\$14,658		
4	Construction Staking	1	LS	\$20,000.00	\$20,000	41%	\$8,273	59%	\$11,727		
5	SWPPP/Erosion Control	1	LS	\$38,000.00	\$38,000	41%	\$15,720	59%	\$22,280		
General Construction Items (non-decorative only)											
6	AC Digouts	600	CY	\$600.00	\$360,000			100%	\$360,000		
7	HMA Paving - Overlay	2000	TON	\$130.00	\$260,000			100%	\$260,000		
8	4" Thermoplastic Striping	10000	LF	\$4.00	\$40,000			100%	\$40,000		
9	Thermoplastic Roadway Pavement	8	EA	\$250.00	\$2,000			100%	\$2,000		
10	Thermoplastic Bike Lane Pavement	20	EA	\$250.00	\$5,000	100%	\$5,000				
11	Thermoplastic Crosswalk Pavement	2	EA	\$2,000.00	\$4,000	100%	\$4,000				
12	Remove 4" Striping	1200	LF	\$2.50	\$3,000	100%	\$3,000				
13	6" Thermoplastic Striping - Bike Lane	9000	LF	\$6.00	\$54,000	100%	\$54,000				
14	Roadside Signs	45	EA	\$650.00	\$29,250	100%	\$29,250				
15	Clearing and Grubbing	25000	SF	\$1.00	\$25,000	100%	\$25,000			100%	\$25,000
16	Construction Office	2000	SF	\$6.00	\$12,000	100%	\$12,000				

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4. Project Estimate

DON'T DO THIS!

Item No.	Item	Quantity	Units	Unit Cost	Total Item Cost	Costs/Items		Costs/Items		to construct	
						%	\$	%	\$	%	\$
General Overhead-Related Construction Items											
1	MOBILIZATION	1	LS	\$300,000.00	\$300,000	100%	\$300,000	0%	\$0		\$0
2	CONSTRUCTION SURVEY AND MONUMENTATION	1	LS	\$55,000.00	\$55,000	100%	\$55,000	0%	\$0		\$0
3	STORMWATER POLLUTION	1	LS	\$22,000.00	\$22,000	100%	\$22,000	0%	\$0		\$0
4	TRAFFIC CONTROL	1	LS	\$55,000.00	\$55,000	100%	\$55,000	0%	\$0		\$0
5					\$0	100%	\$0	0%	\$0		\$0
General Construction Items (non-decorative only)											
6	Traffic striping, signs, flashing beacons & pavement markings	1	LS	\$191,000.00	\$191,000	100%	\$191,000	0%	\$0		\$0
7	Accessible Pedestrian Signals (APS)	1	LS	\$4,999.00	\$4,999	100%	\$4,999	0%	\$0		\$0
8	Curb Extensions	1	LS	\$1,045,000.00	\$1,045,000	100%	\$1,045,000	0%	\$0		\$0
9	Curb Ramp	1	LS	\$320,000.00	\$320,000	100%	\$320,000	0%	\$0		\$0
10	Pedestrian Activated Flashing Beacon	1	LS	\$150,000.00	\$150,000	100%	\$150,000	0%	\$0		\$0
11	Pedestrian Scale Street Lighting	1	LS	\$921,970.00	\$921,970	100%	\$921,970	0%	\$0		\$0
12	Speed Humps	1	LS	\$60,000.00	\$60,000	100%	\$60,000	0%	\$0		\$0
13	Tree trimming / root pruning / Sidewalk	1	LS	\$95,484.55	\$95,485	100%	\$95,485	0%	\$0	2%	\$2,000
14	Signal modification	1	LS	\$1,000,000.00	\$1,000,000	100%	\$1,000,000	0%	\$0		\$0
15	Speed Feedback Sign	1	LS	\$175,000.00	\$175,000	100%	\$175,000	0%	\$0		\$0
Subtotal of Construction Items:					\$4,395,454		\$4,395,454		\$0		\$2,000

4. Project Estimate

Lessons Learned

- Show the costs for each phase regardless of the funding sources
- Do not use Lump Sum for all estimated costs
- The ATP does not allow for cost increases. Account for cost escalation in the estimate
- Account for NEPA in PA&ED costs if the project construction cost is over \$1M



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Questions?

5. Crash/Safety Data, Collision Maps and Countermeasures



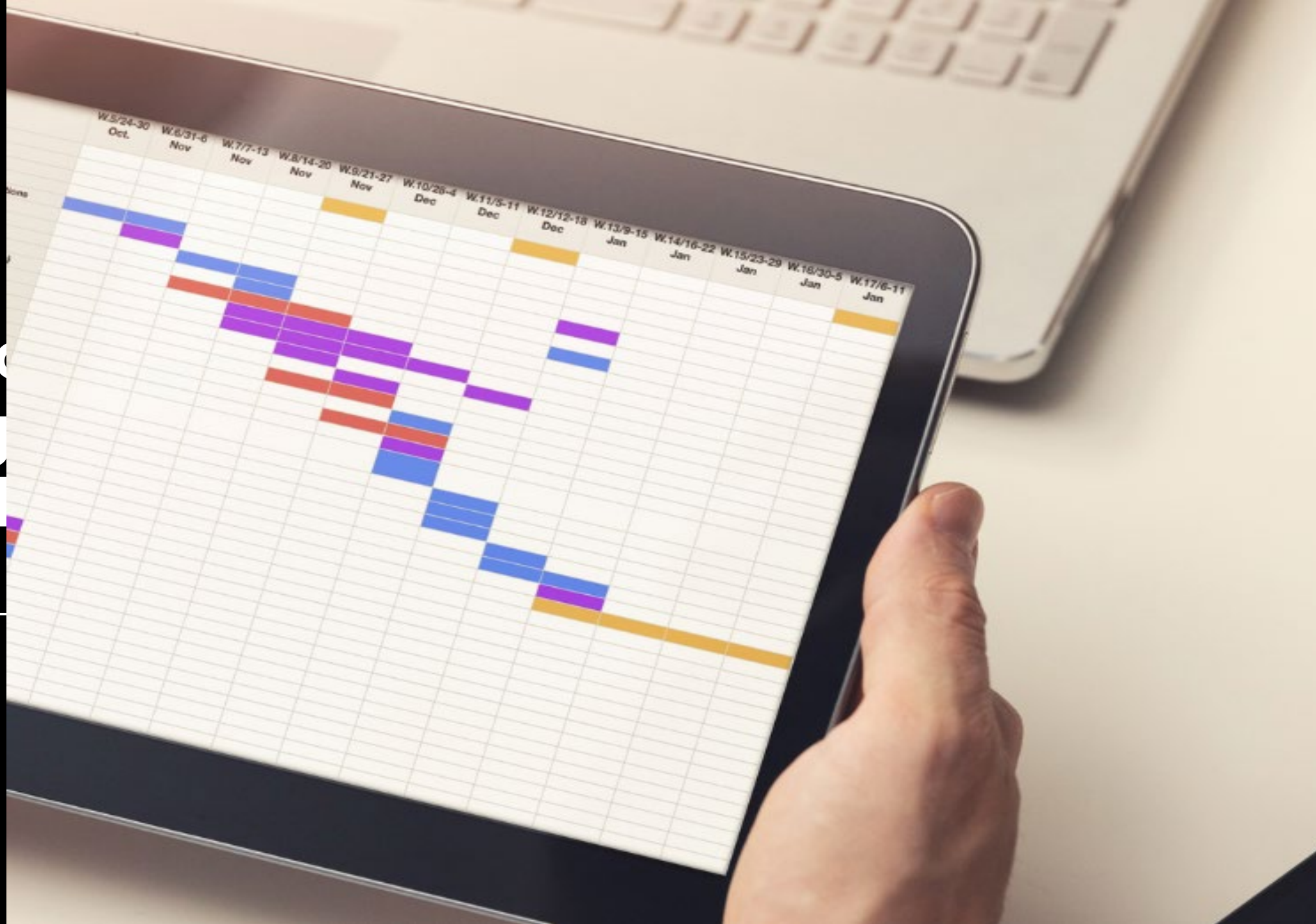
5. Crash/Safety Data, Collision Maps and Countermeasures

General Overview

- Confirm that the crash data shown is:
 - Depicted accurately
 - Shown to scale
 - Occurred within area of proposed improvements



6. Project Funding Request



6. Project Schedule, Funding, and Programming Request

ATP Project Development & Delivery Timeline

4 Year Programming Period

Up to 4 Years

3 to 12 + Months

Project Approval & Environmental Document (PA&ED)

- Environmental Clearance
- Permits - Regulation Agencies

6 to 12 + Months

Plans, Specifications, & Estimates (PS&E)

- 30/60/90%
- Develop Engineering Estimate

6 to 18 + Months

Right of Way (ROW)

- Utility Relocation
- ROW Acquisition
- Eminent Domain

6 + Months

Construction (CON)

- Up to three years to build

These phases can happen concurrently

6. Project Schedule, Funding, and Programming Request Considerations

- Aligning with the construction season
- Coordinating with other funding schedule
- Preparing for Allocations
 - CTC meetings occur 7 times per year
 - Agencies need to submit their allocation requests to the Districts **60 days** prior to the upcoming CTC meeting
 - For allocation request deadlines visit the Caltrans Office of the California Transportation Commission Liaison (OCTCL) [website](#)



- Provide adequate time for NEPA
 - (assume federal funding if your project is over \$1M)
- Provide adequate time for technical studies
 - Cultural
 - Biological
 - Historical
- Provide adequate time for regulatory clearances
 - Army Corps of Engineers
 - Department of Fish and Wildlife
 - Water Resources Control Board
 - California Coastal Commission
 - Etc.



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6. Project Schedule, Funding, and Programming Request

Lessons Learned – PS&E

- Consider
 - Project complexity
 - Other project sponsors in the vicinity
 - Drainage systems, Utilities, R/W, Environmental Mitigation
 - Coordinating with Caltrans if your project encroaches on State R/W to ensure that it meets Caltrans standards
 - Securing necessary permits (such as CDFW 1600 Permit, Coastal Development Permit, etc.)



6. Project Schedule, Funding, and Programming Request

Lessons Learned – R/W

- Railroad involvement and coordination (minimum of 18 months)
- Utility relocations
- R/W acquisition
- Temporary Construction Easements
- Encroachment Permits (projects encroaching on State R/W)



Questions?



7. Warrant Studies/ Guidance

7. Warrant Studies/Guidance

If Applicable

- Provide an engineering study for new Traffic Control Signals with the name and license number of the responsible engineer





8. Additional Narration and Documentation



8. Additional Narration and Documentation

- Ensure that the application text in the “Narrative Questions” is consistent with and supports:
 - Engineering logic
 - Calculations used in the development of the plans/maps and estimate
- Attach the appropriate documentation showing engineering decisions and calculations when including non-standard elements.

Questions?

Non-Infrastructure

Overview of ATP Non-Infrastructure
Application Requirements & PSR
Equivalency



Non-Infrastructure (NI): Education and encouragement activities that further the goals of the ATP

- Projects can be NI Only or Infrastructure/NI combined
- Includes projects benefiting school students, older adults, or entire communities
- Can be start-up Programs or new components of existing programs
- Must demonstrate how the program is sustainable



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Non-Infrastructure (NI) Examples

- Bike/Walk curriculum in schools
- Bike/Walk skills classes (Bike Rodeo/Mock City)
- Walk/Bike to school/work days
- Bike/Walk safety education at community events
- Student/Parent safety patrols
- Crossing guard program
- Temporary demonstration projects
- Safe walking/biking media campaigns

NI is NOT public engagement for an infrastructure project

- See Appendix B (ATP Guidelines – To be updated)



- The 25-R is the NI project's scope
 - Outlines tasks/deliverables, schedule, and costs
 - Verify deliverability and compliance with ATP and NI Guidelines
- Make sure what you describe in the narrative of the application is included in the 25-R
- Establish partnering commitments with other agencies prior to submitting the application
 - Consultants must be competitively bid
- Reference the NI Guidance for eligible expenditures





Tips to Completing the 25-R

- **Scope**
 - Break up the project into overarching Tasks
 - Break up each Task into individual Activities
 - Tasks and Activities must be consistent with the application narrative
 - Be detailed and specific
 - Quantify number of activities
 - Include tangible deliverables
 - Include any additional comments/details in the Task Notes Section



Tips to Completing the 25-R

• Cost

- Ensure total costs on 25-R matches PPR and application
- Ensure compliance with NI Guidance for eligibility & cost of items
- Include Agency/Partner Agency staff costs and TBD consultant staff budget (*on Task pages*)
- Include anticipated costs for Travel, Equipment, Supplies/Materials, Incentives, Other Direct Costs (*on “Other Costs” pages*)
- Indicate if any costs are coming from a source other than ATP



Tips to Completing the 25-R

- **Schedule**
 - Ensure schedule on 25-R matches PPR and application (Part A5)
 - SRTS projects need to coordinate with school schedules
 - Combo projects - NI should coordinate schedule with infrastructure component

Questions?

Plans

Overview of ATP Plan Application Requirements & PSR Equivalency



Plans

General Overview

Plan: The development of a community wide bicycle, pedestrian, safe routes to school, or active transportation plan that encompasses or is predominately located in a disadvantaged community

- A Plan is a stand-alone project type



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Attachment H: Plan Scope of Work (Exhibit 25-Plan)

- The 25-PLAN is the Plan's scope
 - Outlines tasks, schedule, and costs
 - Verify compliance with the ATP Guidelines Plan Components
- Make sure what you describe in the narrative of the application is included in the 25-Plan
- Include the Plan Components Sheet
 - Checkmark if included or explain why not
- Include key planning tasks such as:
 - Existing analysis
 - Robust community engagement
 - Project prioritization/ implementation plan
 - Note: Plans cannot go beyond 30% conceptual design





Tips to Completing the 25-Plan

Note: Do Not Copy the Sample Scope of Work - Your Project is Unique

- **Scope**
 - Break up the project into overarching Tasks (*Task Title Blue Bar*)
 - Break up each Task into individual sub-tasks (*each line – 1, 2, 3*)
 - Tasks and Activities must be consistent with the application narrative
 - Be detailed and specific in the Task Description
 - Select the component(s) the task addresses from the drop-down menu



Tips to Completing the 25-Plan

Note: Do Not Copy the Sample Scope of Work - Your Project is Unique

- **Cost**

- Ensure total costs on 25-Plan matches PPR and application
- Include anticipated cost for each task
- Indicate if any costs are coming from a source other than ATP

- **Schedule**

- Ensure schedule on 25-Plan matches PPR and application
- Include project start date and end date for each task

Questions?

Active Transport Resource Centre



General Overview

- **Purpose:** "The ATRC's mission is to provide resources, technical assistance, and training to transportation partners across California to increase opportunity for the success of active transportation projects."





Lead Agency + Partners

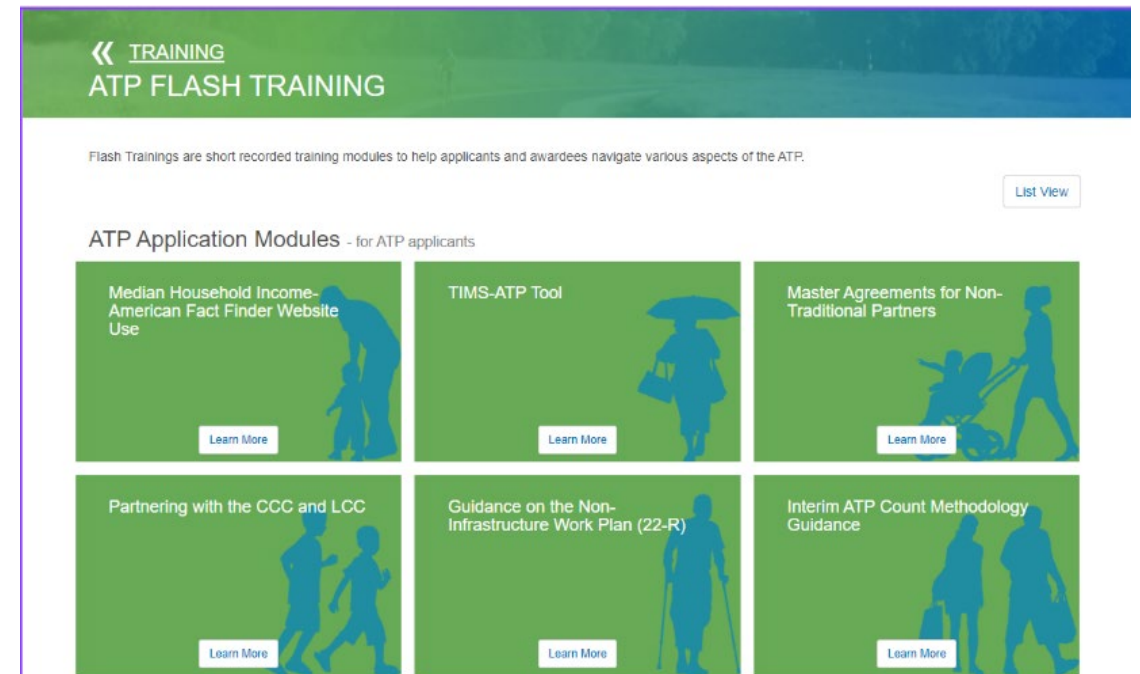
- Caltrans Office of State Programs administers the ATRC.
- ATRC utilizes a combination of subject matter experts (SME) from state agencies, universities, and consultants to help deliver the project.



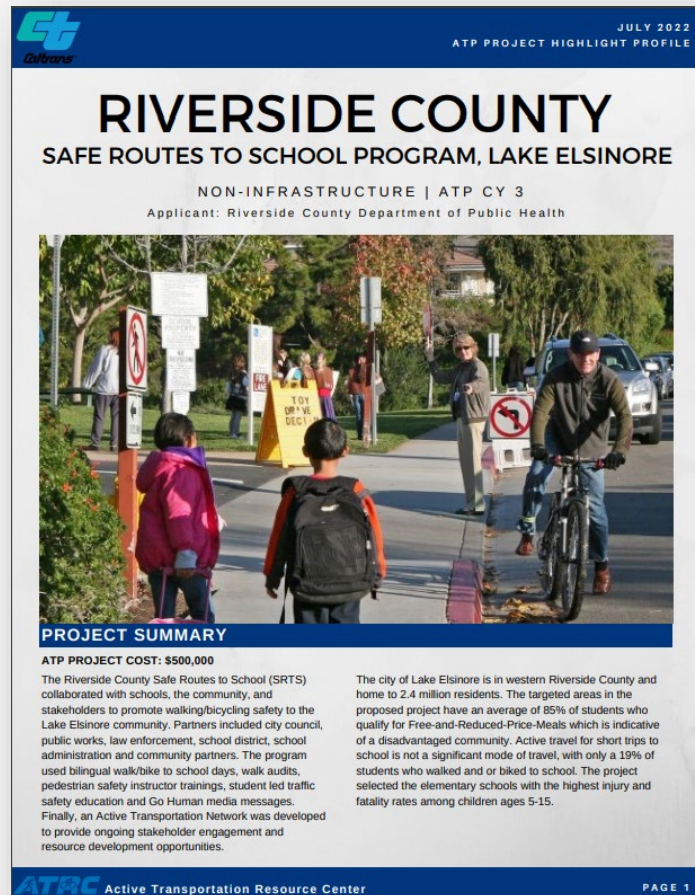


ATRC AT-A-GLANCE

- [Website](#)
- Local agency trainings
- Local agency technical assistance
- Resources
- Data analysis tools
- Equipment loans
- Networking opportunities
- Communication



Current ATRC Initiatives



- DAC TA
- Statewide Active Transportation Counts Database
- Evaluation Framework
- Project Profiles
- ATP Benefits/Cost Calculator
- ATP Symposiums



Technical Assistance

- CDPH Team provides on-call technical assistance by district!
- Reach out to atsp@cdph.ca.gov to get connected

NI On-Call Technical Assistance

Victoria Custodio
Districts: 1, 2, 3, 4, 5
Victoria.Custodio@cdph.ca.gov

Alicia Ramos
Districts: 6, 9, 10, 11
Alicia.Ramos@cdph.ca.gov

Marianne Hernandez
Districts: 7, 8, 12
Marianne.Hernandez@cdph.ca.gov





Contacts

- **Local Assistance Contacts:**
 - <https://dot.ca.gov/programs/local-assistance/other-important-issues/local-assistance-contacts>
- **District ATP Coordinators:**
 - <https://dot.ca.gov/-/media/dot-media/programs/local-assistance/documents/atp/atp-district-coordinators.pdf>
- **HQ ATP Contacts**
 - **Infrastructure**
 - **Desiree Fox** (Districts 1, 2, 3, 4, 5)
 - **Cirilo Salilican** (Districts 6, 9, 10, 11)
 - **Elijah Hall** (Districts 7, 8, 12)
 - **Non-Infrastructure and Plans + ATRC**
 - **Ali Doerr Westbrook** (Program Manager)
 - **Michael Hutnick**
 - **Emma Mallonee**

Questions?



Wrap Up Summary and Take-Aways



Top Takeaways - Infrastructure

1. Perform a site visit! Walk the project site (with the appropriate staff, such as engineers, R/W specialist, environmentalist, key stakeholders)
2. All three elements of application must be consistent (narrative, cost/schedule, map/plans)
3. The scope in the application at the time of programming is the approved scope
4. Community engagement, ensure the project meets the community's needs
5. Ensure that the plans show where and what project elements are proposed
6. When in doubt, reach out!

Top Takeaways – Infrastructure Project Delivery

Project Delivery Considerations

1. Utility service lines
2. Drainage infrastructure modifications
3. Driveway conforms
4. Account for emergency vehicle or truck traffic (i.e. for turning radius and inflexible barriers, etc)
5. Conflict points at intersections
6. Level of traffic stress

Please note: Refer to design standards guidance when designing projects

Top Takeaways - Non-Infrastructure

1. Complete your 25-R with your specific and unique project. This is your scope.
2. Application narrative and 25-R must be consistent!
3. Make sure your project aligns with the goals of the ATP
4. Check eligibility of items by looking at the NI Guidance
5. Be specific! Quantify as much as possible in the 25-R
6. Establish public-entity partnerships before application submittal
7. When in doubt, reach out!

Top Takeaways - Plans

1. Complete your 25-Plan with your specific and unique project. This is your scope.
2. Application narrative and 25-Plan scope must be consistent!
3. Make sure your project aligns with the goals of the ATP
4. Complete the Plan Components Sheet
5. Ensure your project includes community engagement activities
6. When in doubt, reach out!



Project Design Resources

Manuals/Guides:

- Caltrans Highway Design Manual and Design Information Bulletins
- NACTO Design Guides
- FHWA Bikeway Selection Guide

Infrastructure Training:

- Bicycle Transportation: Introduction to Planning and Design (online training)
- Safe Transportation for Every Pedestrian (STEP) Training Recordings

Non-Infrastructure Training:

- [Non-Infrastructure Webinar Recordings](#)
- [Non-Infrastructure Workshop](#)