Presentation Outline

- ATP Background
- PSR-Equivalent Purpose
- PSR-Equivalent Definition and Requirements
- Engineer's Checklist (See slide #20)
- Non-Infrastructure
- Plans
- Wrap-Up
- ATRC
ATP Background
"The ATP goals include increasing proportion of trips by walking and biking, increasing safety and mobility, enhancing public health and includes a broad spectrum of projects to benefit many types of active transportation users."
The ATP has five basic 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 Pilot**
- Interim capital (infrastructure) projects that are built with durable, low-cost materials, and last one to five years
ATP Application Types

**SMALL INFRASTRUCTURE**
Total Project cost less than $2 Million

**MEDIUM INFRASTRUCTURE**
Total Project cost between $2 and $7 Million

**LARGE INFRASTRUCTURE**
Total Project cost greater than $7 Million

**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

**QUICK BUILD PILOT**
Any cost. Infrastructure project. Must be stand alone, cannot be combined with any other application type
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.
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

958 Total ATP Projects
- 567 Active
- 355 Completed

38 Lapsing phases Totaling: $27 Million

30 Cancelled Projects Totaling: $32 Million

Number of Time Extensions

Number of Scope Changes

- 276 Cycle 1
- 213 Cycle 2
- 201 Cycle 3
- 55+ Cycle 4
- 3+ Cycle 5

- 87 Approved Minor
- 3 Declined
- 10 Approved Major
- 15 Withdrawn
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.
PSR-Equivalent Definition and Requirements

According to the Adopted PSR Guidelines, 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

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
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?

Questions About PSR Equivalent – 10 minutes
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
The PE should check to ensure the following items are included in the application:

1. Project Location Map (Attachment C)
2. Project Map/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)
1. Project Location Map
1. Project Location Map

The project limits must be clearly depicted in relation to the overall agency boundary.
1. Project Location Map
1. Project Location Map
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.
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
2. Project Layout/Plans
2. Project Layout Plans
General Overview

- **Infrastructure Layout-Plans**
  - Show the existing and proposed conditions and features
  - Include a scale 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.
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

This layout/cross section is clearly showing all the proposed work, and R/W lines.

This is a good example for a simple project, except it needs a cross section and R/W lines.
2. Project Layout Plans

Clearly shows work being performed and how it relates to the location and where on the project it is occurring.
2. Project Layout Plans

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

- 2-D plans can show work that will not actually fit the terrain.
- These plans are proposing non-ADA compliant ramps, driveways and sidewalks.
- ATP can’t fund non-compliant facilities/projects.
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 proposed work
2. Project Layout Plans
Lessons Learned

- Clearly identify crosswalk locations and legs
  - New crosswalk, enhance existing crosswalk
- Clearly describe the layout and location of trees and lighting
- 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 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 main streets
  - Show entire project limits
  - If you have multiple locations, show plans for each location
3. Cross Sections
3. Cross Sections
General Overview

• Must show existing and proposed conditions.
• Must include a cross-section for each segment where the width of improvements or Right-of-way vary significantly from the typical.
• Must show and dimension: changes in lane widths, R/W lines, side slopes, etc.
• Must show both the width and the depth/thickness for new paving.
3. Cross Sections

This project shows cut lines on the maps with the corresponding section views for each location.
3. Cross Sections

- If existing widths of lanes or sidewalks are being changed, then the following two components may be needed to clearly show what work is being proposed:
- A before/existing and an after/proposed cross section
3. Cross Sections

• This cross-section drawing doesn't consider the existing terrain

• The existing terrain 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.
3. Cross Sections

- The cross section needs to be labeled as existing or proposed.
- Based on the Street view in Google maps, the proposed project doesn’t look like it will fit within the existing footprint of the road. The existing roadway width is unknown.
- The existing R/W is unknown. Potential R/W acquisitions or roadway widening are not shown and are not verifiable. If the project requires R/W 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.
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

- Show R/W lines, existing and proposed

- Show how the proposed conditions will tie into the existing terrain
4. Project Estimate
4. Project Estimate
General Overview

- 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
    - 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 development costs (all phases)
- List R/W acquisition needs (in dollars)
- Include Construction Engineering (CE) costs
4. Project Estimate

Show construction items that are partially or fully ATP ineligible

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<th>Item</th>
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4. Project Estimate

- Lump sum (LS) can be used for Overhead costs.
- Note the tab in the Engineer’s Estimate document that lists the ONLY items that can use LS
4. Project Estimate

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Subtotal Construction Items: $4,395,454  
$1,395,454
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 inflation in the estimate
• Account for NEPA in PA&ED costs if the project construction cost is over $1M
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 Schedule, Funding, and Programming Request
6. Project Schedule, Funding, and Programming Request

ATP Project Development & Delivery Timeline

4 Year Programming Period

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 60 days prior to the upcoming CTC meeting
6. Project Schedule, Funding, and Programming

- Lessons Learned – PA&ED
  - 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.
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 environmental permits (such as 408)
  • 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)
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?

Questions About Engineer's Checklist – 10 Minutes
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
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
• 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

Questions About Non-Infrastructure – 10 Minutes
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
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
Note: Do Not Copy the Sample Scope of Work - Your Project is Unique

Tips to Completing the 25-Plan

• 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?

Questions About Plans – 10 Minutes
Wrap Up
Summary and Take-Aways
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!
• **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."

• [Join our Mailing List](#)

• [Application Topic Flash Trainings](#)
## Disadvantaged Communities Technical Assistance Program

### Tailored Assistance
- Joint and individualized workshops
- Multiple levels of TA

### Site Visit
- Virtual or in-person site visits (hybrid options available)

### ATP Application Assistance
- Project scope development support
- Narrative response review
- Technical support including maps, data, and other relevant project documentation
- Budgeting and cost estimates

### Build Capacity
- Develop staff expertise to last beyond the TA timeframe
- Network and build lasting partnerships with others
Technical Assistance

• CDPH Team now provides on-call technical assistance by district!

• Reach out to atsp@cdph.ca.gov to get connected
Automated Counter Loan Program

• The ATRC provides a free counter equipment loan program to help communities to utilize to achieve count requirements

• Contact the ATRC if you want to borrow Counters

• Fill out the Interest Form!
Found on the ATRC website:

**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
Contacts

- **Local Assistance Contacts:**
  - [https://dot.ca.gov/programs/local-assistance/other-important-issues/local-assistance-contacts](https://dot.ca.gov/programs/local-assistance/other-important-issues/local-assistance-contacts)

- **ATP Coordinators:**

- **HQ Contacts**
  - **Infrastructure**
    - Desiree Fox (Districts 1-5, 10)
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    - Trina Luo (Districts 6-9, 11-12)
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Questions?