



Active Transportation Program



2027 ATP Cycle 8

Project Study Report (PSR) Equivalent Workshop

December 4, 2025

Today's Speakers



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- ATP NI/Plan PM



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

Infrastructure

Long term capital projects that will further the program goals

Non-Infrastructure

Education and encouragement activities that further the program goals

Combination

A project that has both Infrastructure and Non-Infrastructure components

Plans

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



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+
- **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



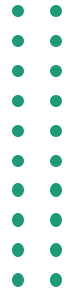
PSR Equivalent Purpose



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



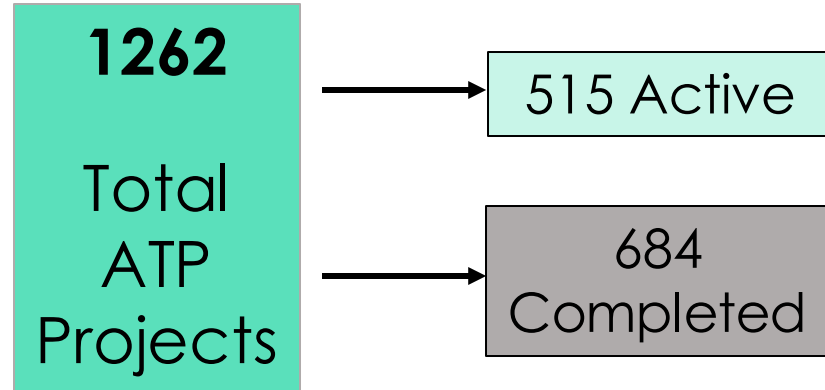
PSR-Equivalent Purpose

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

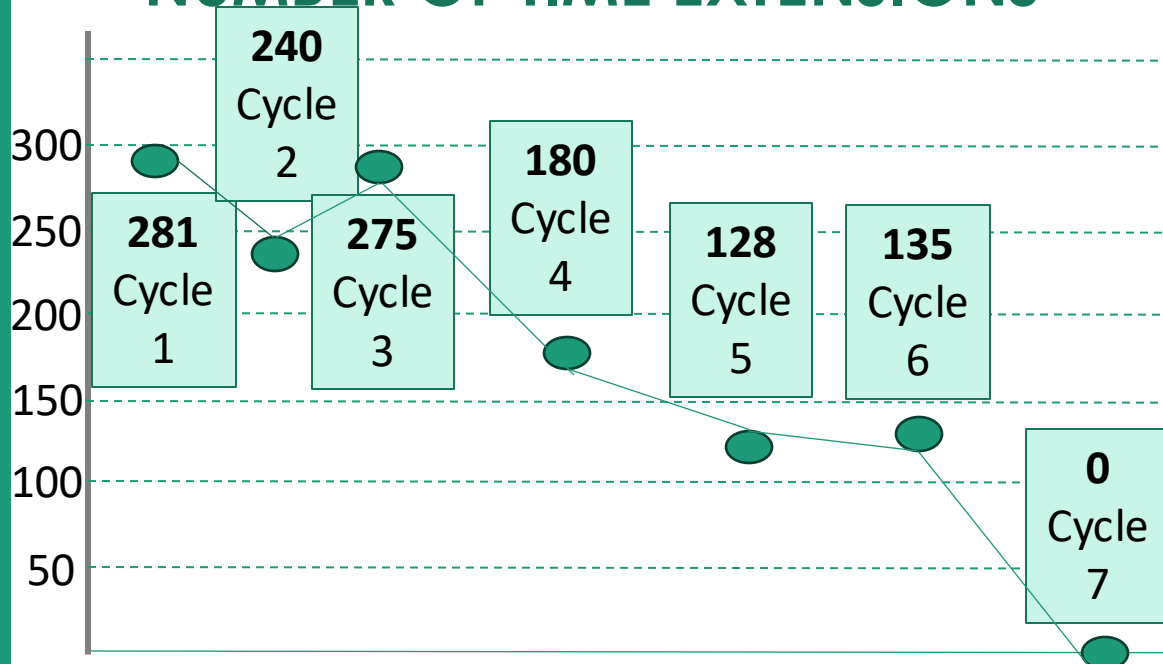
Program Data



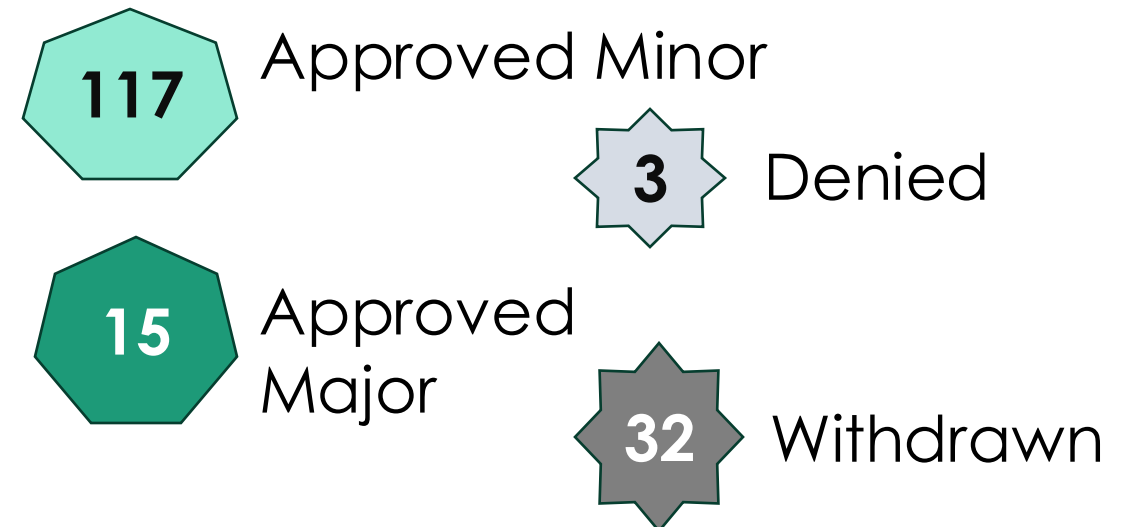
63 Cancelled/Lapsed Projects

Totaling **\$136 Million**

NUMBER OF TIME EXTENSIONS



NUMBER OF SCOPE CHANGES





PSR- Equivalent Definition and Requirements





PSR-Equivalent Definition

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.
 - Feasibility studies are not eligible for ATP funding.

PSR-Equivalent 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 by Section

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 need and purpose, including project costs

Cost/Schedule

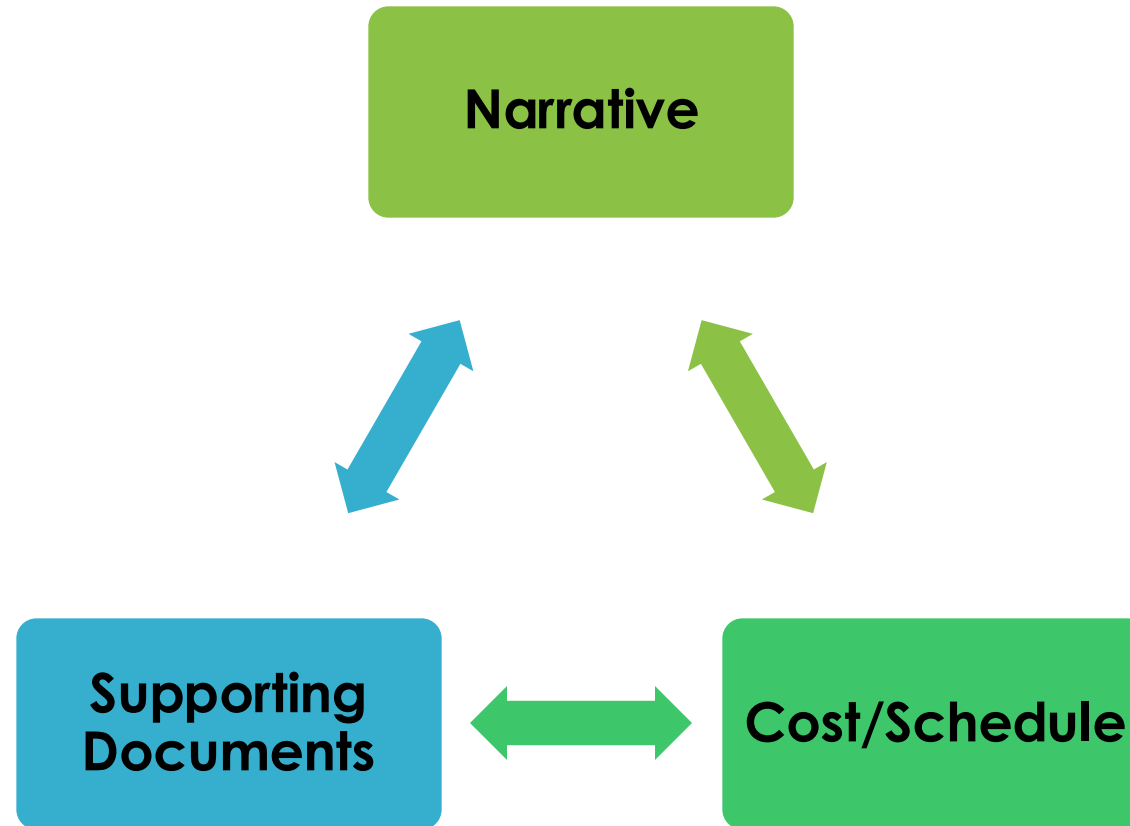
- Project cost estimate:
 - Include project costs, for Project Approval and Environmental Document (PA & ED), Plans, Specifications and Estimate (PS&E), Right of Way (R/W) and Construction, construction management and engineering (CON) phases
 - Project Programming Request (PPR) form with ALL project 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 Requirement consistency

The 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

- Project Schedule and Funding (PPR)

Part C- Application Attachments

- Attachment B- Engineer's Checklist
- Attachment C- Project Location Map
- Attachment D- Project Layout/Plan and Cross Section showing existing and proposed conditions
- Attachment F- Project Estimate
- Attachment K- Additional Attachments

Part C- Application Attachments

- Attachment G- Non-Infrastructure Work Plan
- Attachment H- Plan Scope of Work

Yellow highlighted sections are part of Attachment B- Engineer's Checklist



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 Items

The PE should verify 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)



1. Project Location Map (Attachment C)





1. Project Location Map

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



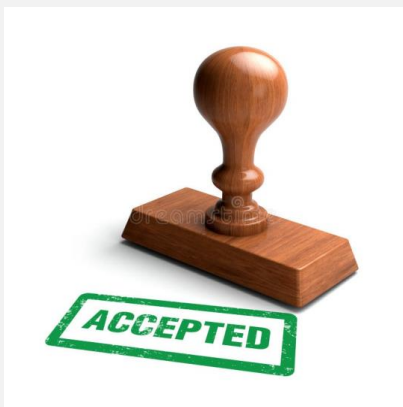
Acceptable Submission



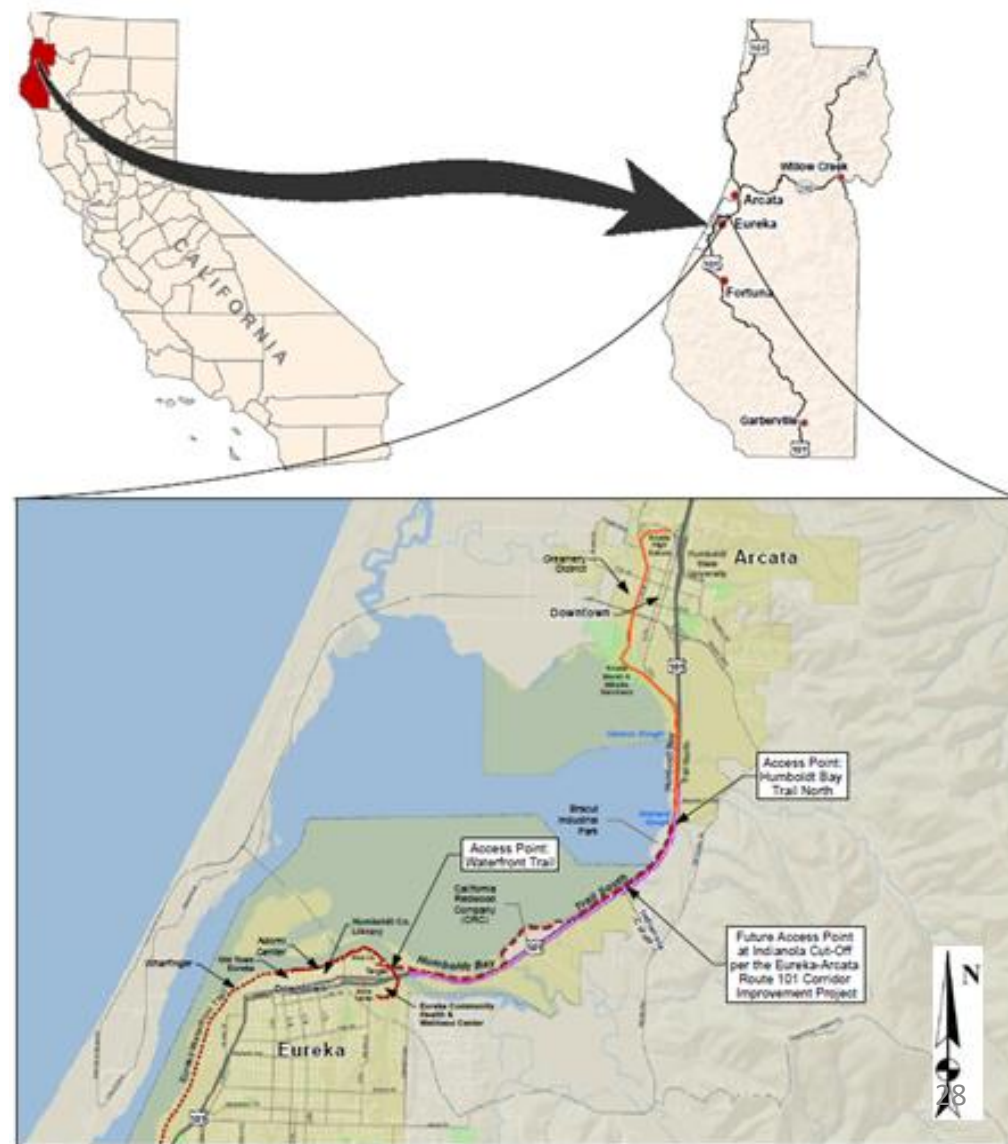


1. Project Location Map-elements

The proposed project limits are depicted, and unlike an agency boundary map, the map shows the overall alignment and important boundaries for the project.



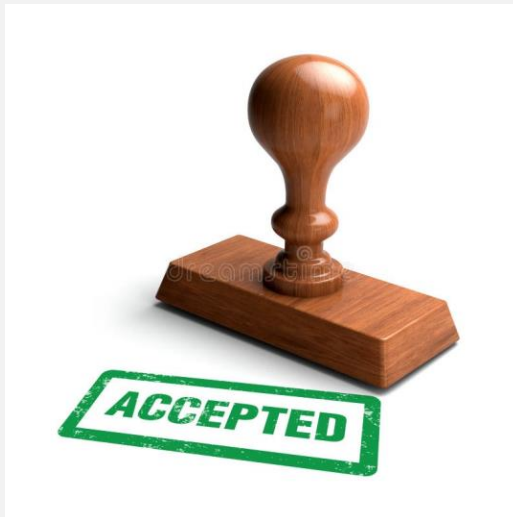
Acceptable Submission



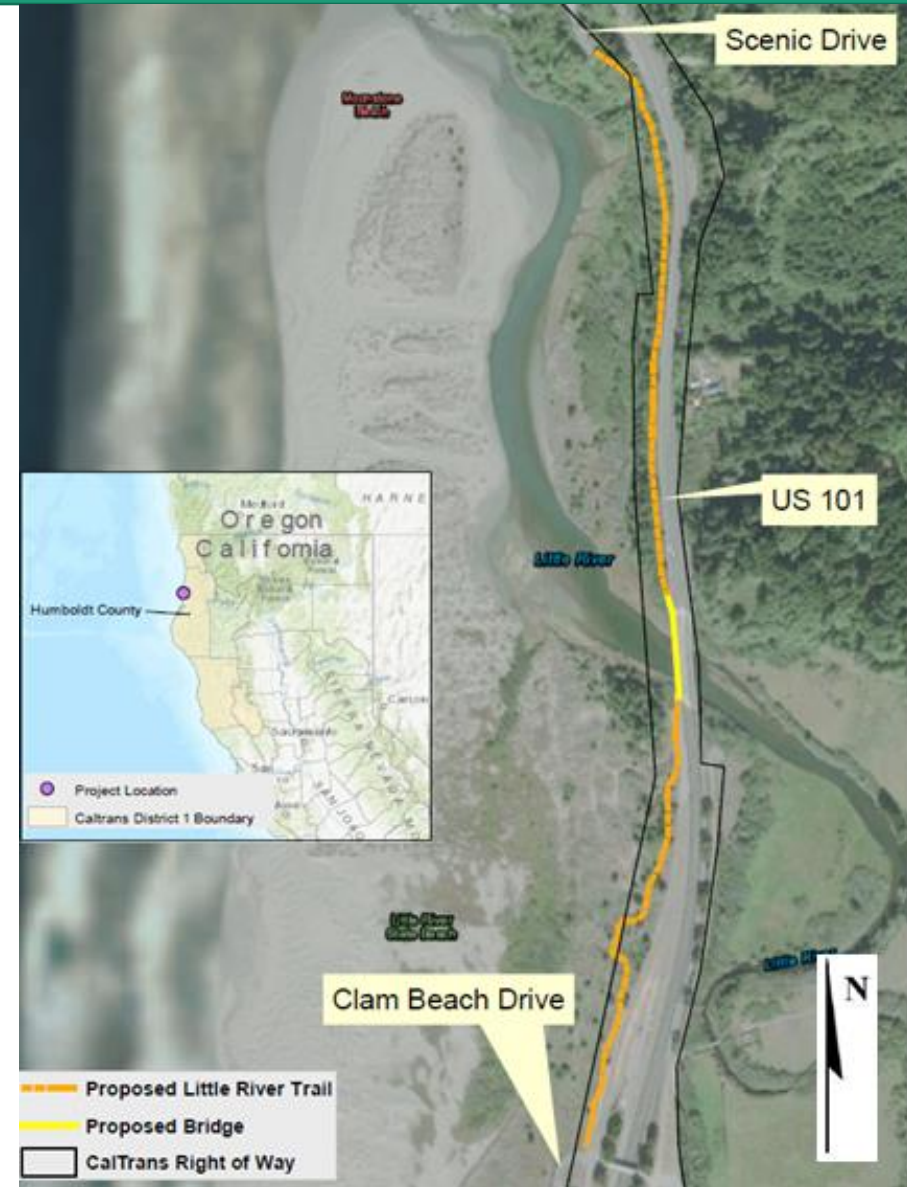


1. Project Location Map-project limits

The project limits within the State right of way are clearly shown.



Acceptable Submission

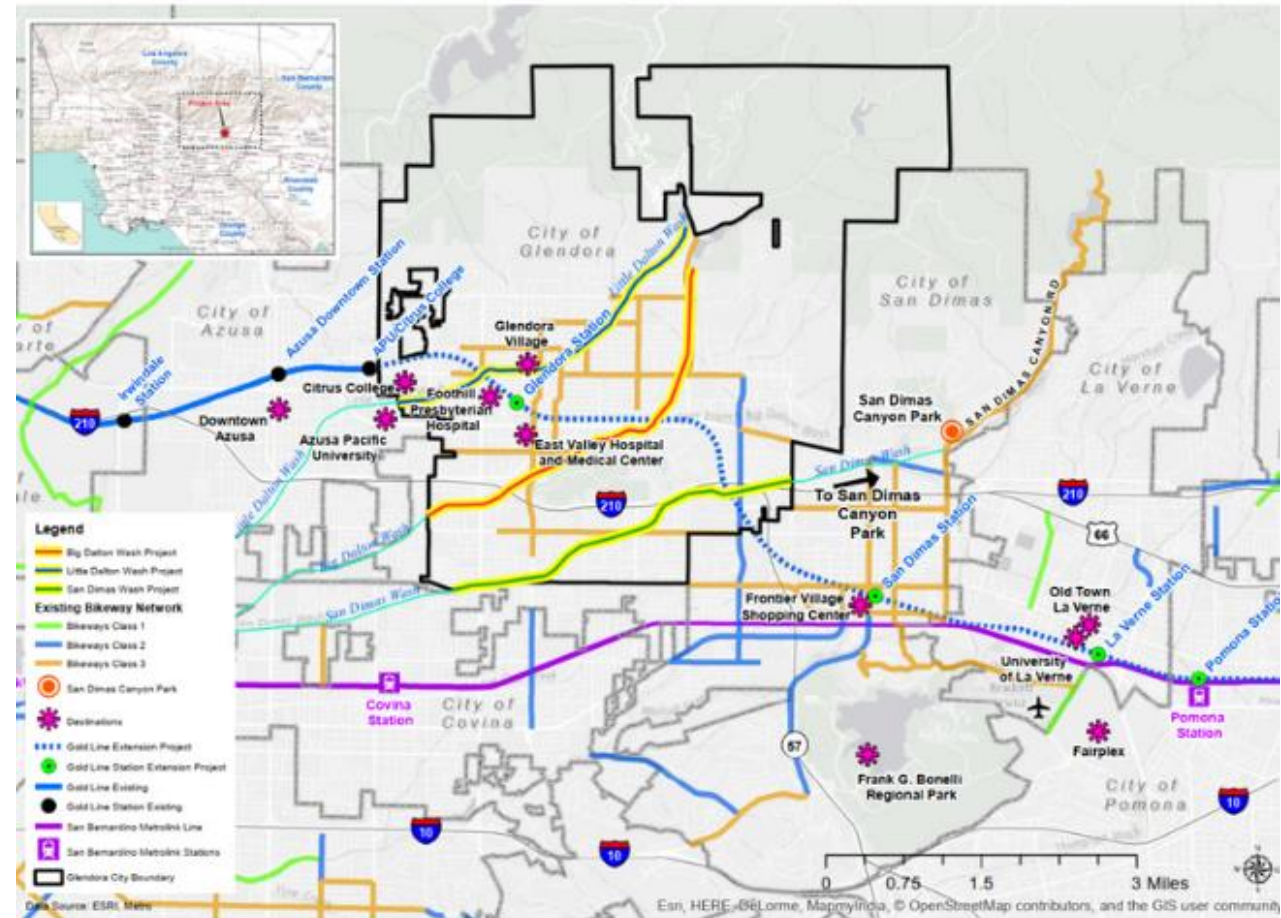


1. Project Location Map unclear

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



Unacceptable Submission



1. Project Location Map

Map Requirements and Best Practices

- Always show the proposed project location --use clear maps, no blurry photos or images
- Clearly show project limits -- identify project boundaries and include a legend





2. Project Layout/Plans (Attachment D)



2. Project Layout/ Plans

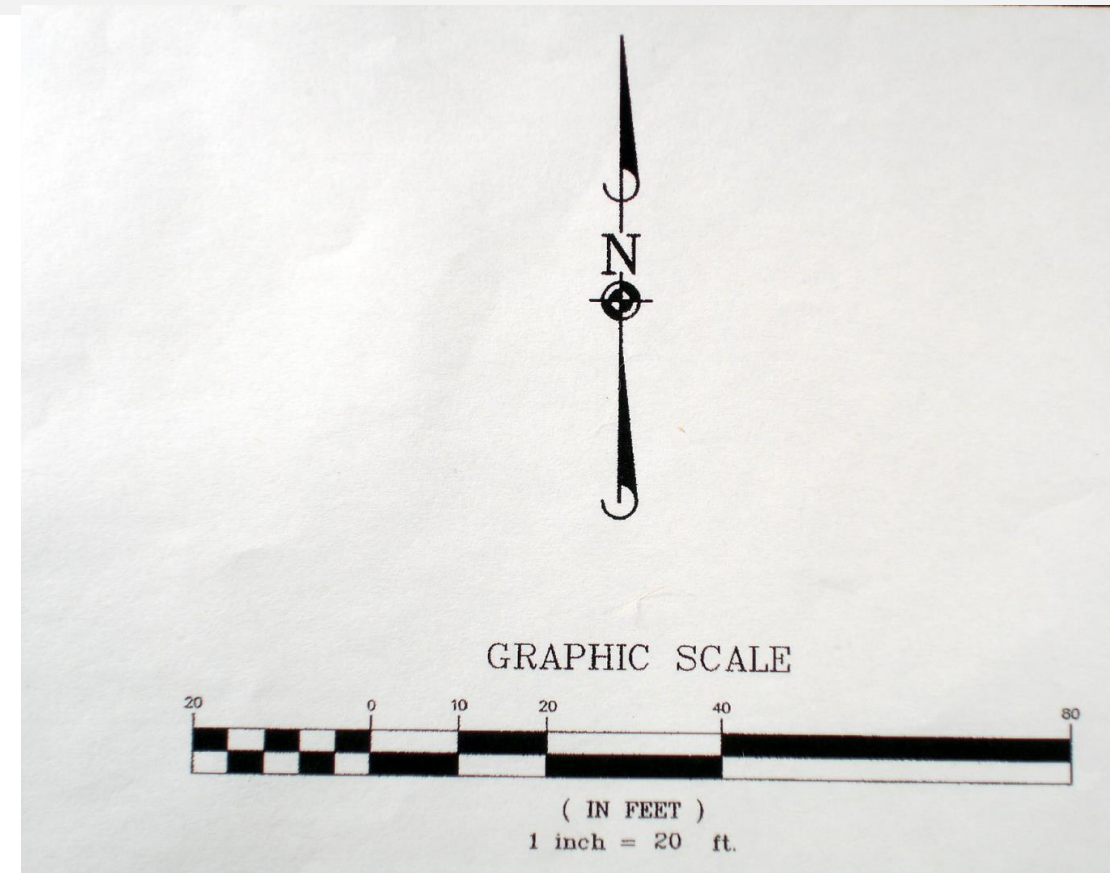
Important Note:

Rule of Thumb –

Using the proposed plans, you should be able to determine the project scope. If you can't, neither can we.

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



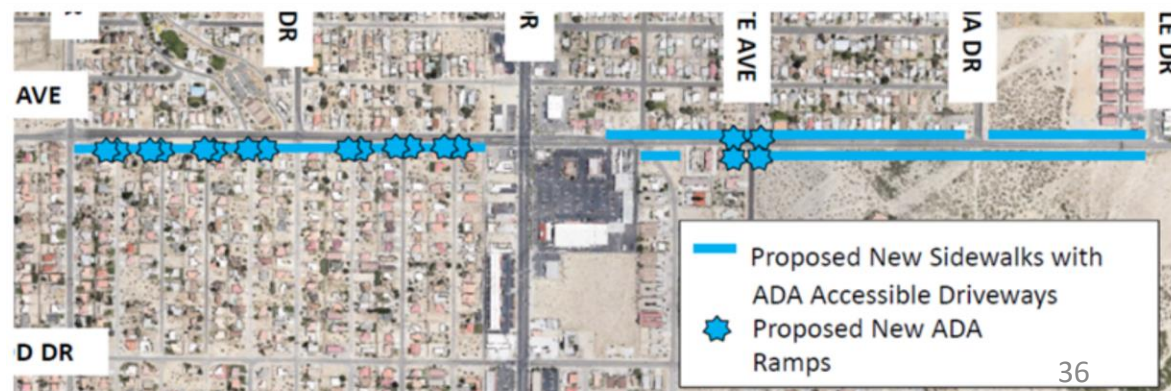
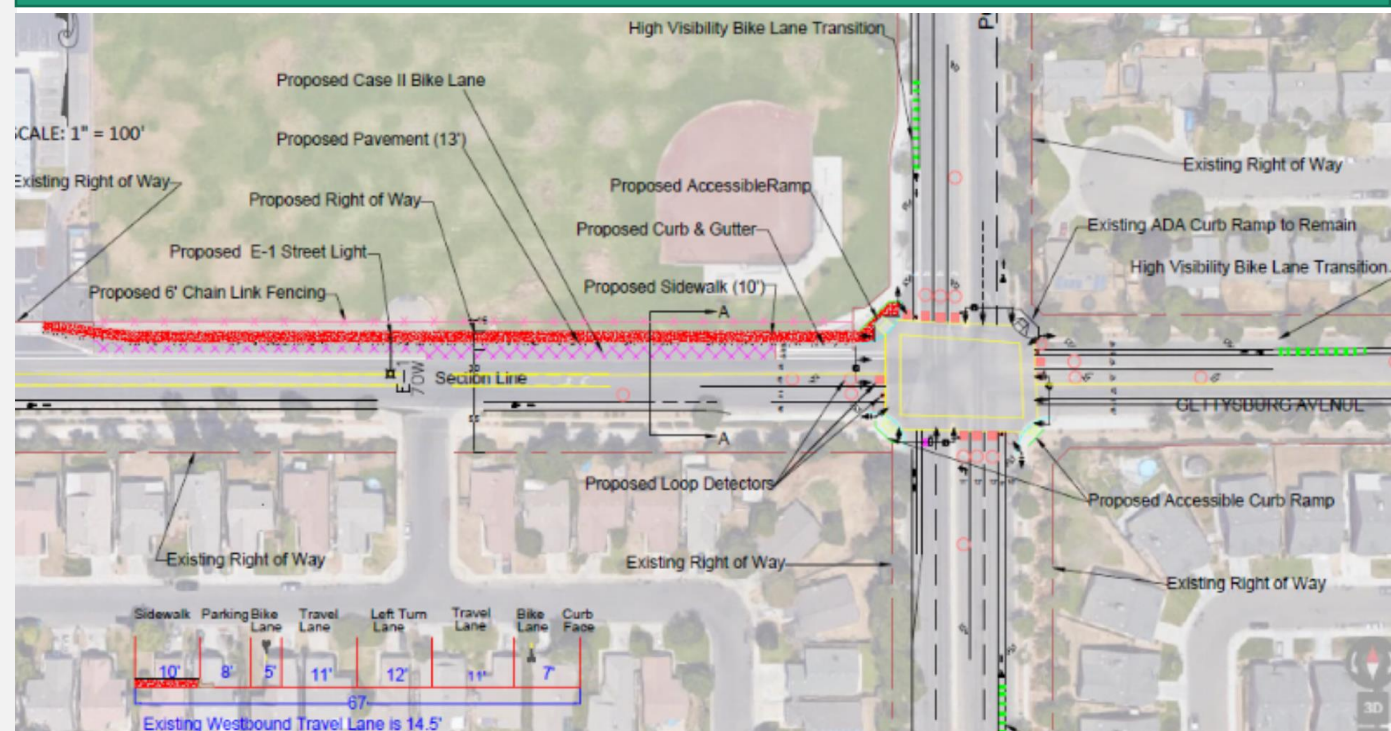
2. Project Layout/Plans

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



This is a good example for a standard ATP project. However, it needs a cross section and right of way lines.

Acceptable Submission

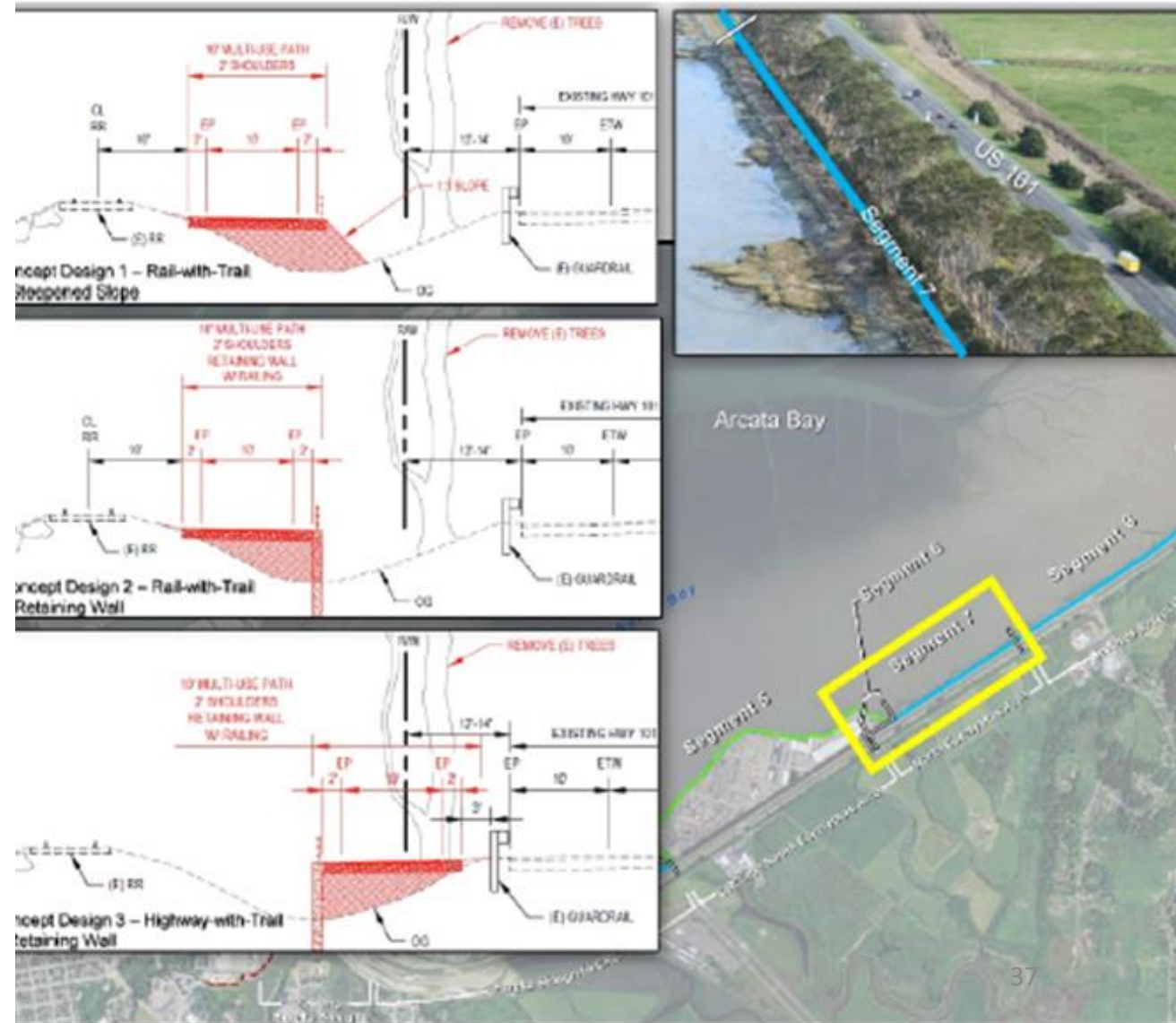


2. Project Layout/Plans with ROW

Clearly shows the proposed ATP improvements and how element fits within the project location and established right of way



Acceptable Submission



2. Project Layout/Plans unclear

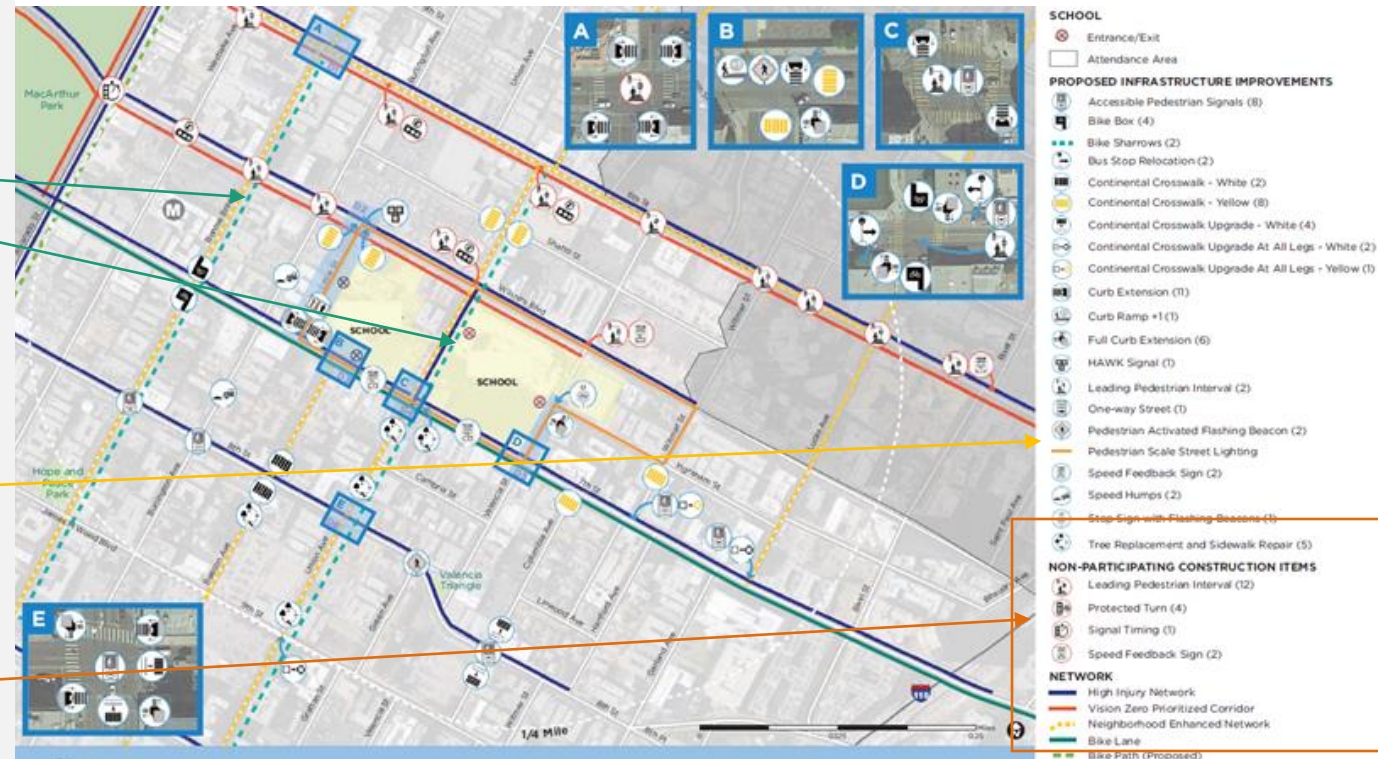
The green (Bike Sharrows) and turquoise (Bike path proposed) dashed lines are difficult to differentiate.

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



Unacceptable Submission

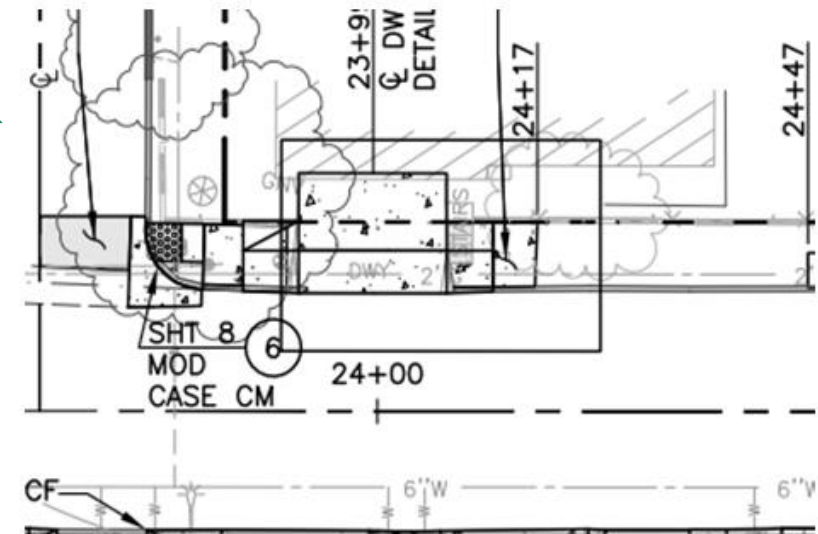


2. Project Layout/Plans unbuildable

- The layout must show the proposed ATP improvements and how each element fits with the project location and right of way.
- The proposed improvements include a non-compliant ADA ramp, modified driveway and stepped sidewalk sections.
- ATP will not fund non-compliant facilities or projects.



Unacceptable Submission



2. Project Layout/Plans with issues

- This photo shows a major conflict for a standard sidewalk improvement with ADA complaint upgrades.
- The application included "30%" plans
- This project's costs included only \$2,000 in R/W
 - This property will most likely lose access to the garage, and the owners will have to be compensated for that loss
- \$697,000 is not an adequate amount of funding for the proposed ATP pedestrian improvements.

Unacceptable Submission



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

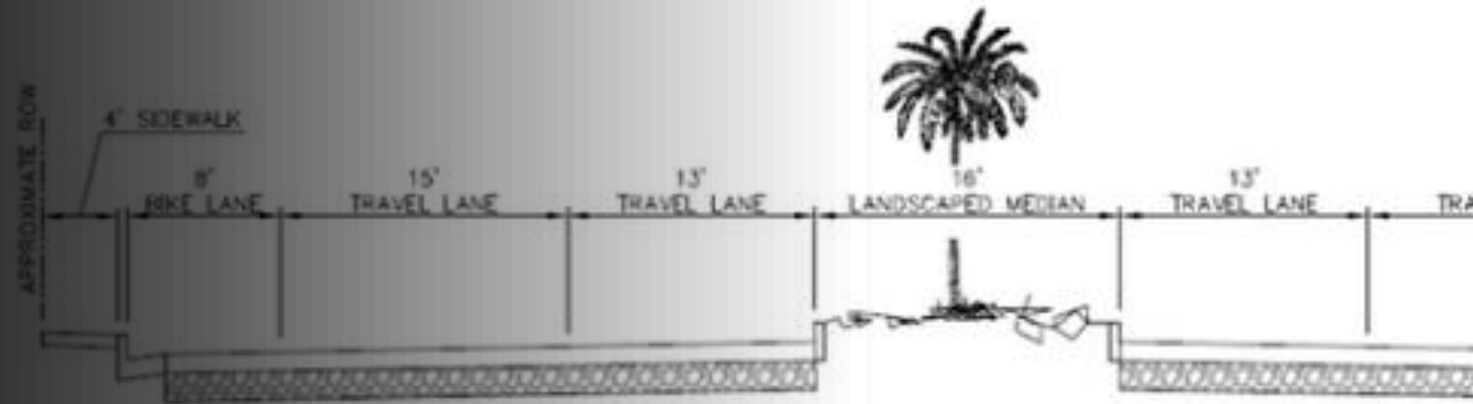
Layout Requirements and Best Practices



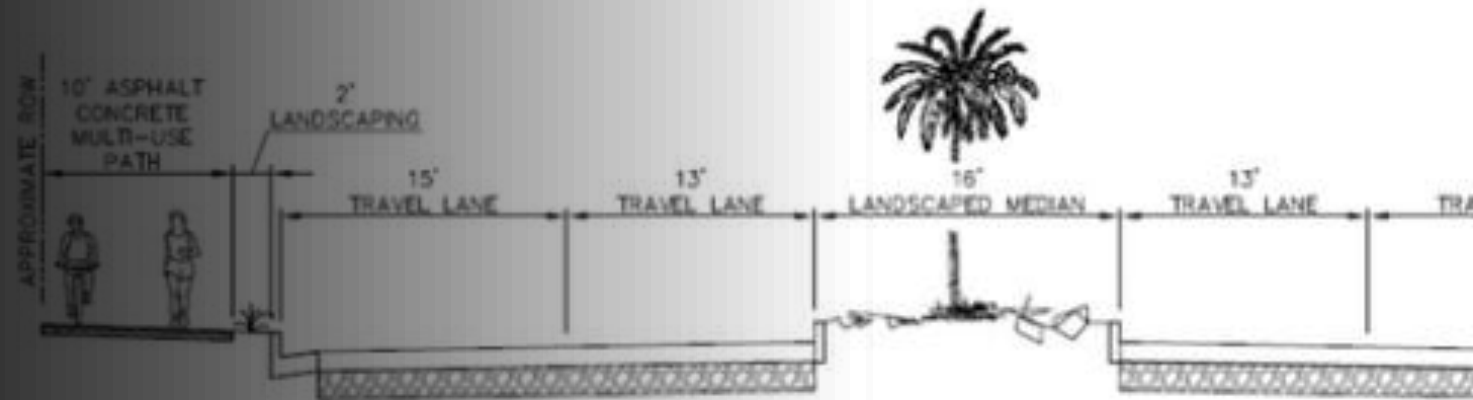
- Clearly identify crosswalk locations and legs
 - New crosswalk and enhance existing crosswalk
- Clearly depict the layout and location of trees and utilities
- Clearly identify the type of bike facility (Ex. Class I, II, III, etc.) and the limits
 - Which side of the road are they located on? (One 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



3. Cross Sections (Attachment D)



EXISTING CONDITIONS
NOT TO SCALE

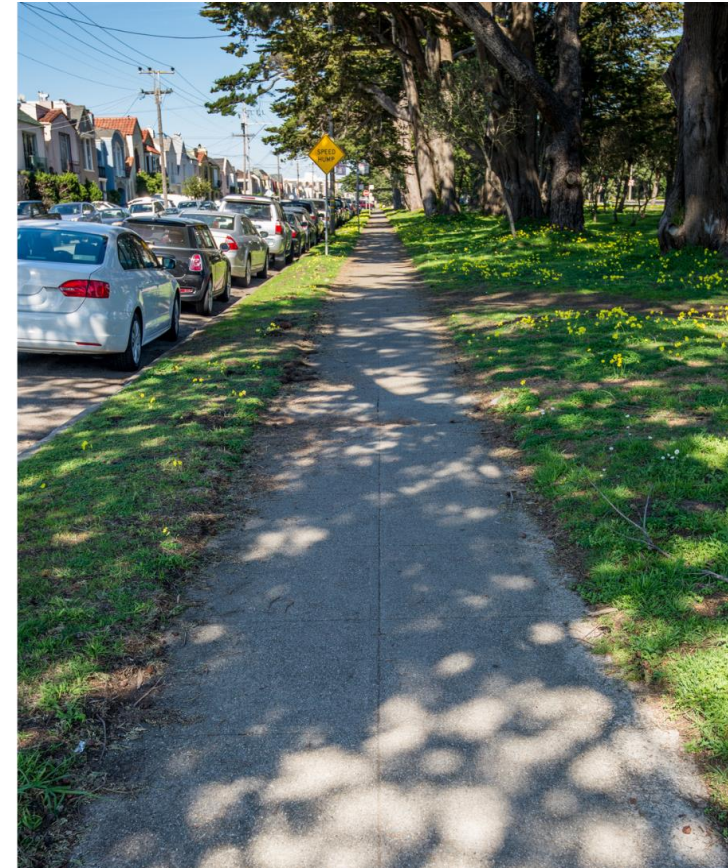


PROPOSED IMPROVEMENTS
NOT TO SCALE

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.

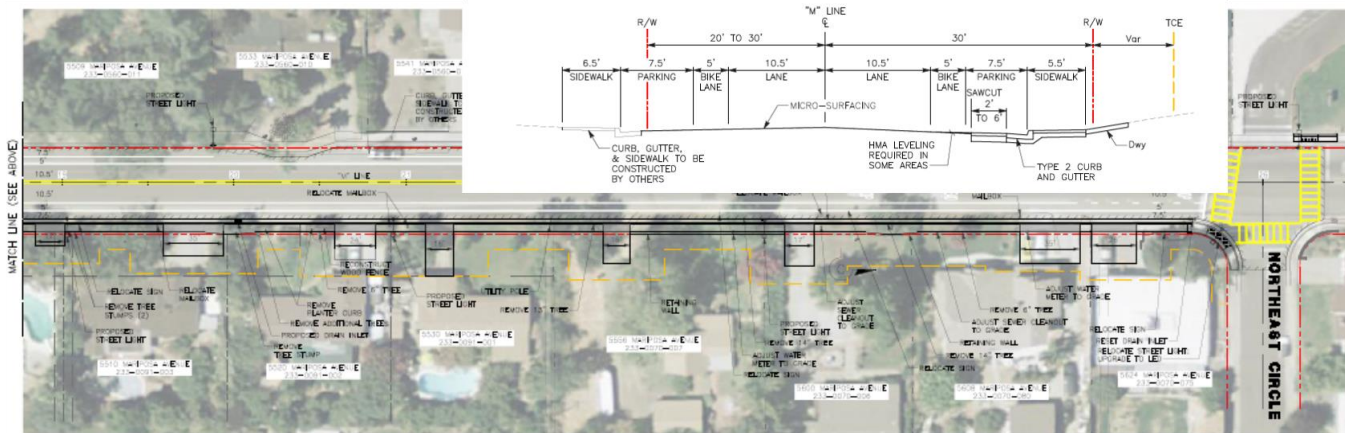


A decorative element consisting of two rows of green dots. The top row has 10 dots and the bottom row has 10 dots, arranged in a rectangular pattern.

-



Acceptable Submission

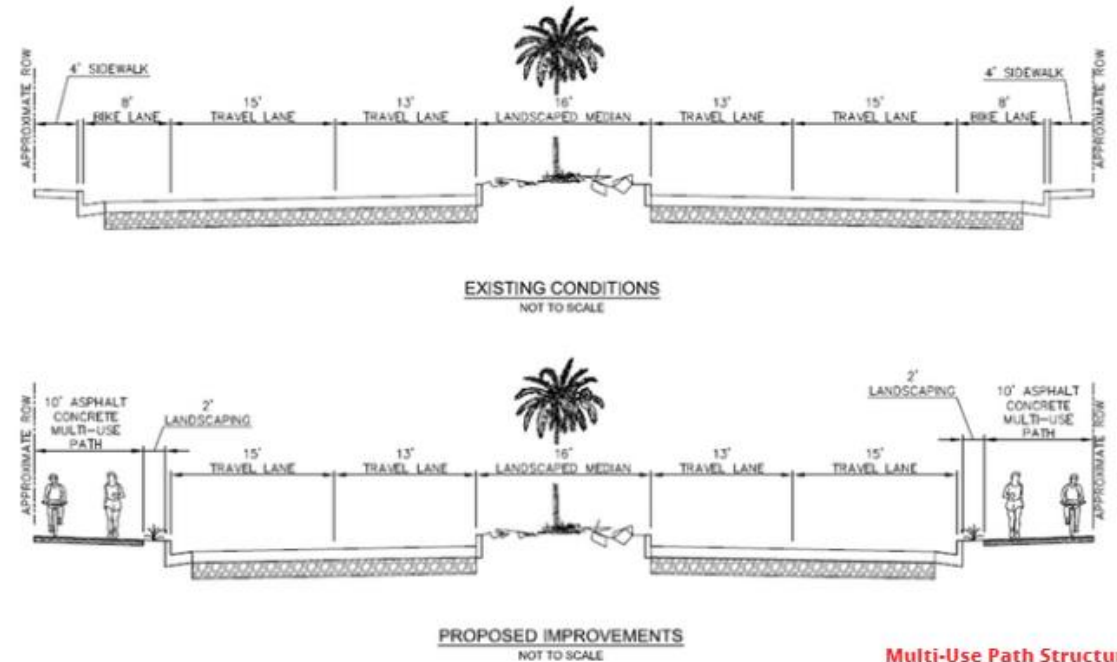


3. Cross Sections very clear information

- If existing widths of lanes or sidewalks will change, then the multiple cross sections may be helpful to clearly depict the proposed improvements.
- For this project, existing and proposed cross sections were used for reference.



Acceptable Submission



Multi-Use Path Structural Section

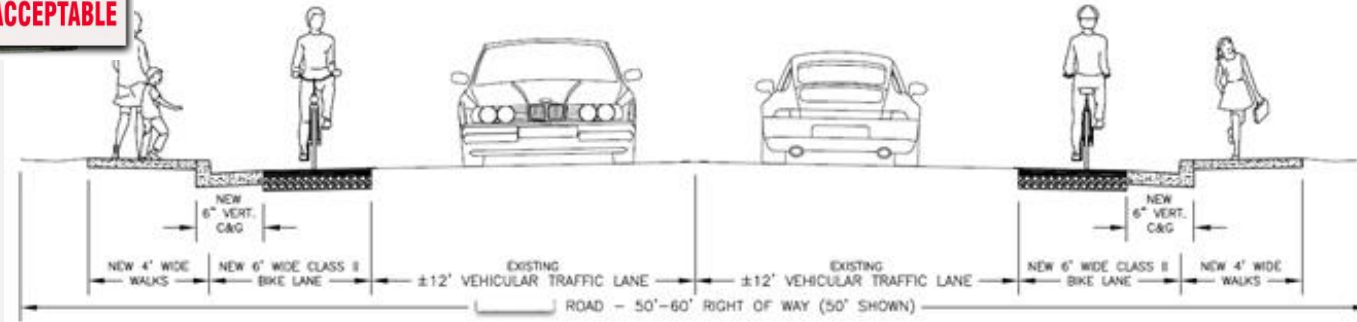
- 2.5" Asphalt Concrete
- 6" Aggregate Base

3. Cross Sections with issues

- This cross section doesn't consider existing conditions, only the proposed 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.



Unacceptable Submission



3. Cross Sections don't match existing

- The cross section needs to be labeled as existing and/or proposed
- Existing and proposed conditions are required for the proposed layout
- Based on Google Street View, the proposed improvements may not fit the existing roadway which 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.

Unacceptable Submission



3. Cross Sections

Cross Section Requirements and Best Practices

- Show the existing conditions and how they will be changed by the proposed 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



A close-up photograph of a person's hands working on a desk. The person is wearing a light blue and white striped shirt. Their left hand is resting on a document with a blue bar chart. Their right hand is holding a blue calculator. The desk is covered with various documents, including one with a blue bar chart and another with a table of numbers. A silver clip is visible on the left side of the desk. The background is dark and out of focus.

4. Project Estimate

- 100

52

4. Project Estimate percent eligible

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	Clearing and Grubbing	25000	SF	\$1.00	\$25,000	100%	\$25,000				

4. Project Estimate instructions

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 (+)

Note the tab in the Engineer's Estimate that lists the typical items that can use LS

DO THIS!

							100%
							100%
							100%
							100%
							100%
							100%
							100%
							100%
							100%
							100%
							100%
							100%

Instructions (do not attach)

Engineer Est. & Project Cost

Allowable Lump Sum Items

4. Project Estimate- issues

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

- Review the Instructions Tab
- Show the costs for each phase regardless of the funding sources
- Segregate ATP Eligible (Participating) and ATP Ineligible (Non-participating) Costs Items
- Do not use Lump Sum for all estimated costs
- Account for NEPA in PA&ED costs if the project construction cost is \$1M or more
- Account for Railroad Mitigation and Utility Relocation Costs
- Account for cost escalation in the estimate
- Estimate should be in line with Project Programming Request (PPR)

[illegible]

5. Crash/Safety Data, Collision Maps and Countermeasures

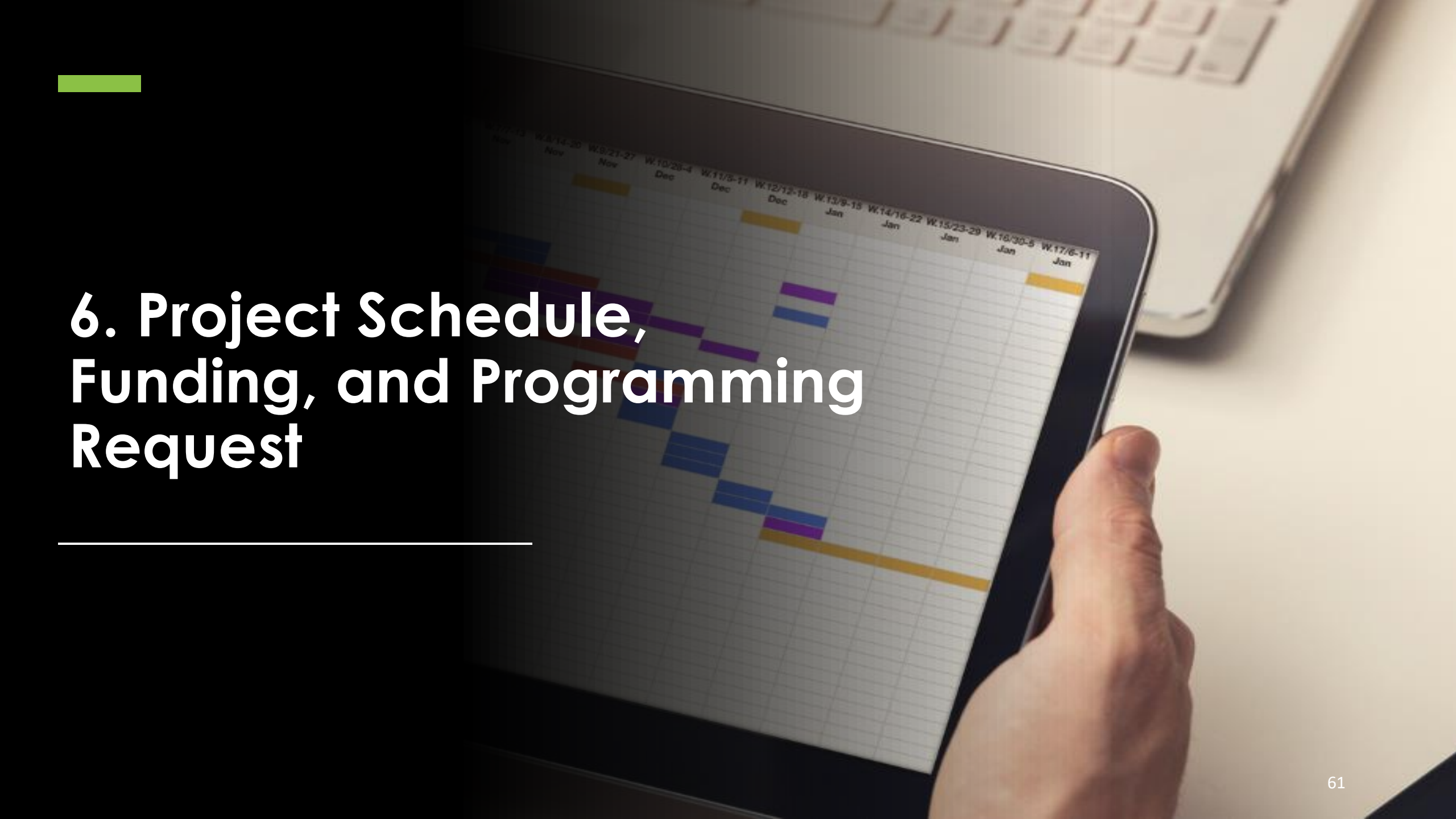


5. Crash/Safety Data, Collision Maps and Countermeasures

General Overview

- Confirm that the crash data shown is:
 - Depicted accurately
 - Shown to scale
 - Occurred within area of proposed improvements
 - Only showing bicycle and pedestrian incidents. Vehicle data is not useful.

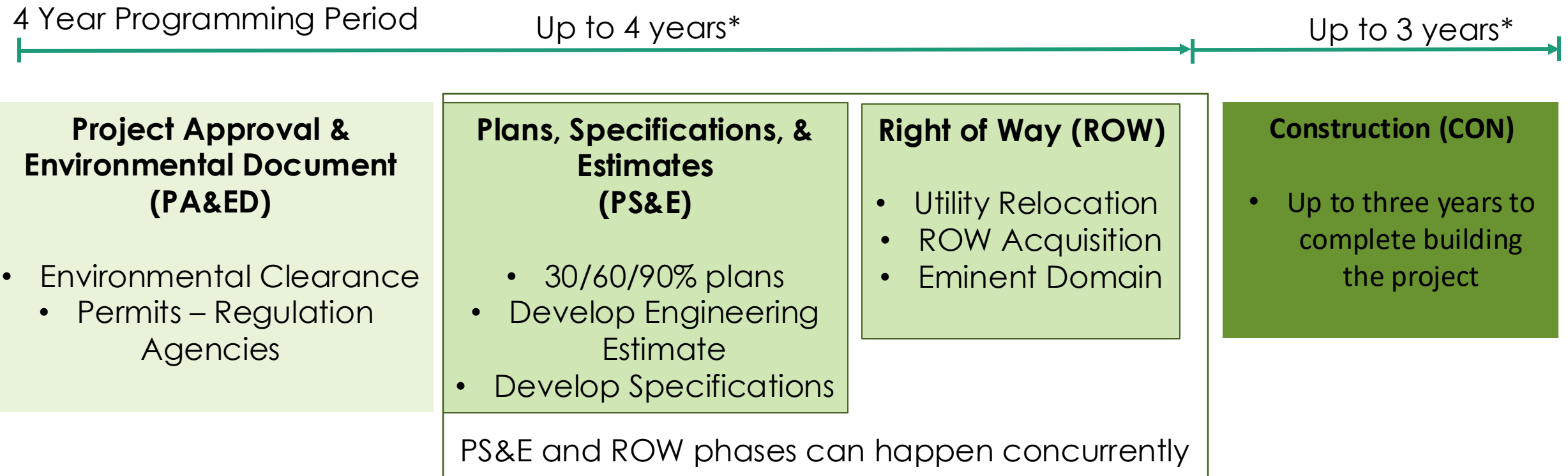


A hand is holding a tablet that displays a project schedule Gantt chart. The chart shows various tasks as horizontal bars of different colors (blue, purple, yellow) across a timeline from November to January. The timeline is divided into weekly intervals, each labeled with a week number and dates. The text '6. Project Schedule, Funding, and Programming Request' is overlaid on the left side of the image in a large, white, sans-serif font. A small green rectangular bar is visible in the top left corner of the image.

6. Project Schedule, Funding, and Programming Request

6. Project Schedule, Funding, and Programming Request

ATP Infrastructure Project Development & Delivery Timeline



*For additional information see [Timely Use of Funds Guidelines Table](#)

6. Project Schedule, Funding, and Programming Request Considerations

- Schedule alignment with the construction season
- Pre-construction and Post-construction User Counts
- Coordinating with other funding schedules (Multi-Funded Projects)
- Baseline Agreements
- Preparing for Allocations
 - CTC meetings typically 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 see the **Preparation Calendar** by visiting the Caltrans Office of the California Transportation Commission Liaison (OCTCL) [website](#)



6. Project Schedule, Funding, and Programming Request Lessons Learned

- Provide adequate time for NEPA, Caltrans coordination for NEPA Certification and Right-of Way Certification if your project construction cost is \$1M or more (assume federal funding)
- 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
- Community Engagements and Stakeholder Coordination
 - Project Scope, Community Support or Concerns
 - Public Transit, Emergency Responders
 - Railroad, Utility, and R/W Coordination



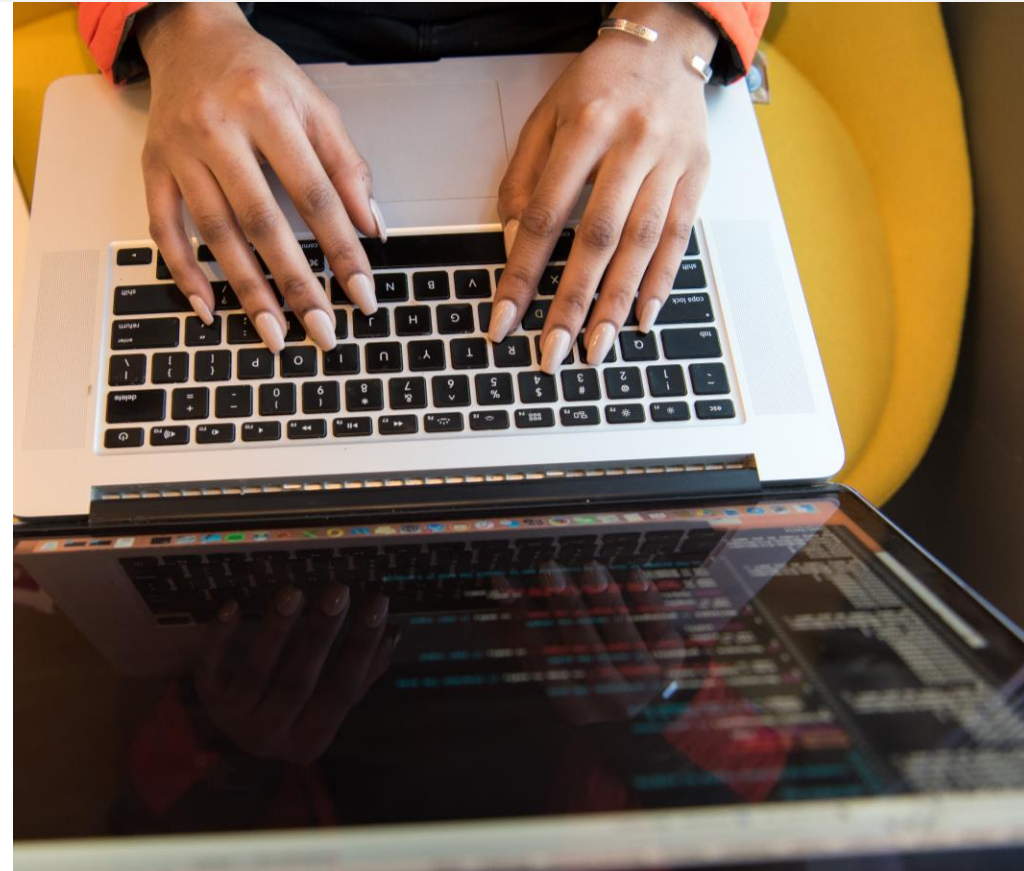
[This Photo](#) by Unknown author is licensed under [CC BY-SA](#)



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

- Verify 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.



Project Amendments





Project Amendments

- PSR equivalent documents should account for known risk and assumptions at time of application.
- Even proper planning and scheduling face risk:
 - Environmental delays, right of way obstructions, community concerns, major utility conflicts, project funding shortfalls, etc.
- If problems arise, agencies should communicate early with your district ATP coordinators.
- Unforeseen project delays that cannot be addressed within the current scope may require project amendments.

Project Amendment types

- There are three types of ATP Amendment Requests
 - Scope Changes- The Commission may consider approving changes to the scope described in the application
 - Funding Distribution Changes- The Commission may consider a request to move funds between phases after the project has been programmed. ATP will not fund cost increases.
 - Project Segmenting- The Commission may consider a request to segment a project
- Time Extensions – The Commission may consider requests to extend programmatic deadlines.

The background image shows a vibrant outdoor playground. In the foreground, there are teal-colored cylindrical structures and a blue and purple play mat. A parking meter is visible on the right. In the middle ground, two children are sitting on a teal structure, and a small potted plant sits on the mat. The background features large yellow and white umbrellas, other people, and a paved area.

Non-Infrastructure

Overview of ATP Non-Infrastructure
Application Requirements & PSR
Equivalency

Non-Infrastructure (NI)

General Overview

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)



Attachment G: Scope of Work (Exhibit 25-R)

- 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

- **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

- **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

- **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

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 Scope

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 Cost & Schedule

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

A high-contrast, low-angle photograph of a person riding a bicycle on a paved path. The image is dominated by strong shadows cast by the bicycle and rider onto the pavement. The front wheel and handlebars are visible in the upper right, while the rear wheel and lower frame are in the foreground. The shadows are sharp and dark, indicating bright sunlight. The pavement has a light-colored, textured surface. A faint, large shadow of a bicycle is visible in the background, suggesting a previous position or a reflection.

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, and changes will require Scope change approval
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](#)
- [FHWA Bikeway Selection Guide](#)
- [NACTO Design Guides](#)

Training:

- [Introduction to Active Transportation Planning and Design](#)
- [Safe Transportation for Every Pedestrian \(STEP\) Resources](#)

Non-Infrastructure Programs:

- [Non-Infrastructure Common Activities](#)

ATP PSR Office Hours

1. Monthly PSR Office Hours will be provided by Caltrans ATP Program Managers January-March
2. Subscribe to the [ATRC mailing list](#) to register!



Contacts

- [District ATP Coordinators](#)
- [Local Assistance Contacts](#)
- **HQ ATP Contacts**
 - **Infrastructure**
 - [Teresa McWilliam](#) (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](#) (Statewide Program Manager)

Final Questions?



Active Transportation Resource Center Overview

Mission

The Active Transportation Resource Center's (ATRC) mission is to provide resources, technical assistance, and training to transportation partners across California to increase opportunity for the success of active transportation projects.



**ACTIVE TRANSPORTATION
RESOURCE CENTER**



Overview

- The Caltrans Division of Local Assistance, Office of State Programs administers and implements the ATRC
- The ATRC utilizes a combination of subject matter experts from state agencies, universities, and consultants to provide active transportation resources that support the ATP
- ATRC has been funded by the ATP since Cycle 1

Partners





What Does the ATRC Offer?

TRAINING

- Provides virtual and in-person training on bicycle and pedestrian planning, design, and safety
- Provides webinars on a variety of active transportation topics

TECHNICAL ASSISTANCE

- Provides technical assistance through individualized support and/or workshops to encourage ATP participation for all ATP project types

RESOURCES/TOOLS

- Develops tools to inform and support active transportation projects
- Provides resources for ATP implementors



Current ATRC Initiatives

- Non-Infrastructure Technical Assistance
- ATP Disadvantaged Communities Technical Assistance Program
- Active Transportation Benefit-Cost Tool
- California Active Transportation Data Portal
- Count+ ATP Performance Metrics

Contact

Active Transportation
Resource Center

ATRC@dot.ca.gov

