



# Transportation Planning Scoping Information Sheet (TPSIS) Guidance

California Department of Transportation  
Division of Transportation Planning  
Office of Project Planning  
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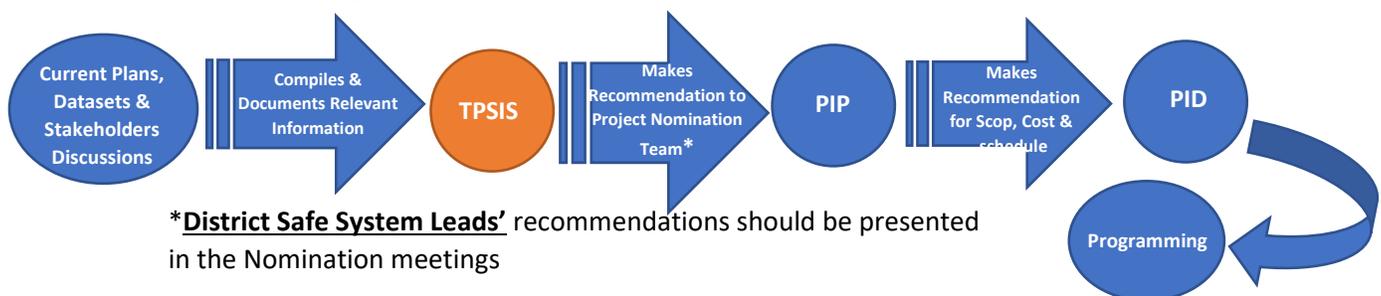
## Background

The Transportation Planning Scoping Information Sheet (TPSIS) compiles and documents relevant information from current plans, datasets, and stakeholder discussions to make recommendations to Project Nomination Teams and District Asset Managers during the pre-PID scoping of multi-objective transportation projects. The TPSIS documents transportation needs, and opportunities identified through the planning process and helps to ensure that proposed projects are consistent with planning concepts, statewide goals, and planning decisions.

In 2019, the Office of Project Planning (OPP) identified a need to update the TPSIS template based on TPSIS products received during the second round of nominating projects for the Project Book. The TPSIS update aims to improve effectiveness of the TPSIS document by condensing TPSIS content to essential information needed to convey planning level considerations during Project Nomination Team and Project Development Team meetings. This effort focuses on ensuring the TPSIS effectively identifies project components which may impact a project's scope, cost, schedule, and performance.

The TPSIS Pilot Process has been designed as a one-year program starting November 2020. Districts can use the new TPSIS template and interim guidance for projects in their 2022 PID workload when appropriate and will be required to use the new TPSIS template beginning with the 2024 PID workload. Throughout the pilot period, the OPP worked with HQ functional units and TPSIS working group to develop a comprehensive TPSIS guidance document, training sessions/workshops and quarterly surveys to monitor the feedback from District users. A TPSIS pilot survey was conducted during the pilot period to gather feedback and suggestions on the usage of the TPSIS template and guidance. HQ OPP conducted multiple focus meetings with SME's (HQ & Districts) to discuss feedback received and update process to address comments and make any necessary modifications to the template. OPP then reconvened with the TPSIS working group to address any fatal flaws and finalize and implement the TPSIS template and guidance.

## TPSIS Role in Project Nomination Process



The role of the TPSIS is to consolidate information from current planning documents, datasets, and public/stakeholder discussions into a single document. The objective of the TPSIS is to use this existing information to identify actionable needs and recommendations to be considered during Project Nomination Team meetings. The TPSIS is required to emphasize its importance informing the development of the project's purpose, need, scope, cost, schedule and performance during the Project Nomination Process and throughout PID development. The TPSIS is ultimately attached to the completed PID. The project's purpose, need, scope, cost, schedule and performance are finalized in the completed PID document which is submitted for programming.

## When is a TPSIS required?

### K-Phase approval and PID Documentation

The TPSIS is a required attachment to the Project Initiation Proposal (PIP), which must be submitted to the Headquarters Office of Project Planning at the time of K-phase approval for all SHOPP (excluding reservations), SB1 and State Sponsored projects to open a project for PID development. For Reimbursement projects, TPSIS is not required at the time of K-phase approval but is a required attachment to the completed PID.

Please see table below for more clarification on when a TPSIS is required:

PID Type	K-Phase approval	Completed PID
<b>SHOPP (excluding reservations)</b>	Required	Required
<b>SB1</b>	Required	Required
<b>State Sponsored</b>	Required	Required
<b>Reimbursement</b>	Not- Required	Required
<b>Safety (010)</b>	Not- Required	Not- Required
<b>Permanent Restoration (131)</b>	Not- Required	Not- Required
<b>Facility (351,352,353,354)*</b>	Not- Required	Not- Required
<b>Advanced Mitigation</b>	Not- Required	Not- Required
<b>Relinquishment</b>	Not- Required	Not- Required

\*TPSIS preparation for SHOPP projects with the main activity category as “ **Facility**” and the PECT code of either 351,352,354 or 355, is **optional** and at the district's discretion based on the needs of the project.

### TPSIS for Refresher/Supplemental PID:

- If the PID was completed in the previous cycle, and a PID refresher or supplemental is being worked on in the current cycle, a new TPSIS is not required.
- If the PID was completed 2 or more cycles ago, and a PID refresher or supplemental is being worked on in the current cycle, a new TPSIS is required and must be attached to the completed PID. For PIDs that were completed years ago (prior to CAT plans, Vulnerability Assessments, Emphasis Area Guides, etc.), TPSIS will ensure that all needs/opportunities are identified and recorded.

## Roles & Responsibilities for TPSIS preparation and use

The roles and responsibilities for the TPSIS are flexible to accommodate the different organizational structures across the Districts.

**TPSIS Lead Office, Unit, Staff Person** – Each district will identify an office, unit or staff person to lead the TPSIS development. The lead can be identified as a single person, office, or unit based on the District Organizational Structure. The District can identify a single person, office, or unit to lead TPSIS development for all projects or can identify different leads on a project by project basis. Districts should clearly identify who is the TPSIS lead to improve coordination and reduce confusion.

**TPSIS Subject Matter Experts** – The TPSIS Subject Matter Experts are responsible for completing or providing information to complete applicable sections of the TPSIS. The TPSIS is comprised of various sections related to existing planning and system information. The TPSIS lead coordinates the development of these sections with the appropriate subject matter experts. Subject Matter Experts may come from fields related to regional planning, system planning, environmental planning, bike/ped planning, climate change, Native American coordination, and other sections of the TPSIS template.

**District Planning Representative Signatory** – The District Planning Representative Signatory is responsible for approving the contents of the TPSIS. Districts have the flexibility to select the District Planning Representative Signatory based on organization structure. The most commonly selected signatories are a District Transportation Planning Deputy, Transportation Planning Senior or Transportation Planning Office Chief.

**District Asset Manager or Project Manager or Project lead** – The District Asset Manager, Project Manager or Project lead is responsible for approving the contents of the TPSIS. Districts have the flexibility to select the signatory based on organization structure. This signatory is generally responsible or invested in carrying the project forward through the future phases of project delivery. The most commonly selected signatories are a District Asset Manager or Project Manager.

**District Safe System Lead** – The District Safe System Lead should be contacted at the time of TPSIS preparation to provide recommendation to be considered during the project nomination and PID development.

## **TPSIS Development Charging Practices**

This section will be updated in the future. The Office of Project Planning is engaged in discussions regarding the resourcing of TPSIS and Project Nomination Process charging practices.

## **Template Overview**

The TPSIS template consists of a proposed project summary and ten sections. In order to provide districts with the flexibility to address context-specific planning considerations, the updated TPSIS template has six required sections and five recommended sections. The recommended sections should be completed at the District's discretion based on the needs of the project. The sections completed for each TPSIS will vary on a project-by-project basis. The TPSIS lead will use their experience and discretion to determine which recommended sections of the template to complete for a project. An overview of the required and recommended sections of the TPSIS template are provided below.

### **Required sections:**

#### Section 1: Summary Statements & Recommended Actions

Identifies "Project Needs/Opportunities", "Project Risks/Challenges" and the "Recommended Actions" and relevant sections containing supporting information.

#### Section 2: Tribal Government Consultation, Local Partners, and Public Engagement Coordination

Provides information regarding tribal government consultation, any identified concerns related to equity priority communities/disadvantaged communities, local partners and other stakeholders.

#### Section 3: Plan and Document Review

Provides a summary of recommendations and considerations identified from a comprehensive review of existing planning documents, datasets and scoping tools.

#### Section 4: Caltrans Stakeholder Information

Identifies internal Caltrans staff contact information for TPSIS Subject Matter Experts who assisted in the development of the TPSIS.

#### Section 5: Climate Change

Provides details related to Climate Change considerations.

#### Section 6: Smart Mobility, Active Transportation and Transit (Only 6-1 is required)

Provides information on the project area, place types, bicycle, pedestrian, rail and transit condition, needs and opportunities.

**Recommended (Optional) Sections:**

Section 7: Environmental Linkage Considerations

Provides details related to Air Quality, Wildlife, Natural Habitat, and Advance Biological Mitigation opportunities.

Section 8: System Planning

Identifies the route designations and facilities type in the project area.

Section 9: Local Development Review

Provide details on local developments which may impact the project.

Section 10: Broadband Coordination

Provides details on Broadband opportunities in the project area.

Section 11: Freight Considerations

Identifies freight opportunities and considerations in the project area.

**Template Instructions/Direction**

**Proposed Project Summary**

This is a summary to provide the identical information of the proposed project that this form is being filled out for. Some of this information may not be available at the time of creating this form and the preparer/s may work with the district project nomination team and project control to get the information.

**Proposed Project Summary**

<b>EA #</b>		<b>AM Tool ID #</b>		<b>EFIS Project ID #</b>	
<b>County-Route-PM</b>					
<b>Anchor Asset</b>					
<b>Proposed Project Scope</b>					
<b>Proposed Fund Type</b>					

- **EA #:** Expenditure Authorization ID
- **AM Tool ID #:** Asset Management Tool ID
- **EFIS Project ID #:** Electronic Financial Information System
- **Anchor Asset:** Most anchor assets will fall into one of four categories: Bridges, Pavement, Culverts and Traffic Management Systems. An anchor typically has a high cost associated with it and potentially has several associated smaller assets and/or needs related to it. Districts ultimately have discretion in selecting anchor assets. Anchor assets can also be Non-SHOPP improvements where assets do not currently exist.
- **County-Route-PM:** May be identified after the project nomination process.
- **Proposed Project Scope:** May be identified after the project nomination process.
- **Proposed Fund Type:** May be identified after the project nomination process.

## Section 1: TPSIS Summary Statements & Recommended Actions

The intended outcome of this section is to summarize the “Project Needs/Opportunities”, “Project Risks/Challenges”, and “Recommended Actions”. Clearly defined recommended actions are used to inform the project nomination process. This section is the conduit for carrying planning recommendations into future phases of project delivery.

### Section 1: TPSIS Summary Statements & Recommended Actions

<b>1-1 Project Summary</b> Refer to TPSIS Section: <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> Other	Provide a justification if needs/opportunities are not recommended to be included in project scope.
Project Needs/Opportunities:	
Project Risks/Challenges:	
<b>1-2 List recommendations based on identified needs/opportunities to be included in project scope. <i>(Provide section references below)</i></b>	
<b>1-3 Road Safety Considerations</b>	If not provide a justification, why.
Has “District Safe System Lead” been contacted through the TPSIS preparation process? <input type="checkbox"/> Yes <input type="checkbox"/> No	

### 1-1 Project Summary

- Refer to TPSIS Section:** Select TPSIS section check boxes which were used to identify and summarize project needs and risks. TPSIS sections which are checked must be completed. The checked TPSIS sections provide the background information for project needs/opportunities. The “Other” checkbox can be used when project needs and risks are identified outside the provided TPSIS sections.
- Project Needs/Opportunities:** Describe the project scope, schedule and cost needs and opportunities based on transportation planning information and analysis. The needs and opportunities in this section can be unconstrained.
  - Justification for identified need/opportunity exclusion from project scope:** Once all project needs and opportunities are identified and summarized, provide a justification for each of the identified need or opportunity, if it is not recommended to be included in project scope.
- Project Risks/Challenges:** Describe the project scope, schedule and cost risks and challenges based on transportation planning information and analysis. The needs and opportunities in this section can be unconstrained.

### 1-2 Recommended Actions

- List out all the recommended actions based on the identified needs/opportunities throughout the TPSIS document to be included in the project scope and provide the appropriate section references. Recommended actions are the synthesis of the project needs/opportunities and risks/challenges. Based on the information in other sections, describe/summarize the specific recommendation actions for the project. It is essential the actions are as clear, concise, and actionable as possible. This information is used to convey the recommended actions based on planning information and analysis to the project nomination team and future phases of project delivery.
- The preparer can also identify the location of recommended actions when applicable. Not all recommended actions are associated with a location.

### 1-3 Road Safety Considerations

- Mark Yes or No checkbox if you have contacted to District Safe System Lead. If the answer is no, provide justification why they haven't been contacted.

## Required Sections Checklist

### Required Sections Checklist *(Check boxes below once completed):*

Section 1    Section 2    Section 3    Section 4    Section 5    Section (6-1)

TPSIS preparers should mark their appropriate section/s once completed. The District Planning Representative should review to ensure all required sections are filled out and marked.

### TPSIS Signatories

Prepared for use in Project Nomination by:  _____	Received for use in Project Nomination by:  _____
<b>District Planning Representative      (Date)</b>	<b>District Asset Manager                      (Date)</b>

The TPSIS requires two signatories: A District Planning Representative and a District Asset Manager or Project Manager or Project Lead. The purpose of these signatories is to ensure the TPSIS has been vetted, approved, and received by appropriate staff.

The purpose of the District Planning Representative signatory is to confirm that relevant planning considerations, data, and recommendations are captured in the TPSIS document. Districts have the flexibility to select the District Planning Representative Signatory based on organization structure. The most commonly selected signatories are a District Transportation Planning Deputy, Transportation Planning Senior or Transportation Planning Office Chief.

The purpose of the District Asset Manager or Project Manager or Project Lead signatory is to confirm that relevant planning considerations, data, and recommendations have been received. This signature also confirms the planning considerations, data, and recommendations from the TPSIS will be used to inform the project nomination process. Districts have the flexibility to select the signatory based on organization structure. This signatory is generally responsible or invested in carrying the project forward through the future phases of project delivery. The most commonly selected signatories are a District Asset Manager or Project Manager.

## Section 2: Tribal Government Consultation, Local Partners, and Public Engagement Coordination

### 2-1 Tribal Government Consultation

2-1 TRIBAL GOVERNMENT CONSULTATION – <a href="#">Caltrans Tribal Relations Team</a> ; <a href="#">NALB Resource Intranet Page</a>		
<p>2-1-1 Tribal Lands – <i>Is the proposed project:</i> within or near an Indian Reservation Rancheria, or Tribal Trust Land? <a href="#">NALB Tribal lands Viewer</a>; <a href="#">DEA GIS Library</a></p> <p><input type="checkbox"/> Yes   <input type="checkbox"/> No</p>	<p><i>If so, indicate if:</i></p> <p><input type="checkbox"/> The project involves trust land(s) (including tribal and individual allotted lands) outside of a reservation or Rancheria</p> <p><input type="checkbox"/> Tribe(s) have been informed of the project and will be coordinated with during project development</p> <p><input type="checkbox"/> All applicable tribal laws and regulations have been reviewed for required coordination</p>	<p><i>Provide names of TRIBES, TRIBAL GOVERNMENTS, reservations, Rancherias, tribal trust lands.</i></p>

**Source:** Contact your District Native American Liaison (DNAL) and District Native American Coordinator (DNAC) for information on consultation, engagement, and tribal laws and regulations. The HQ Tribal Relations team is available to provide guidance and assistance to all. Reference the [NALB Tribal lands Viewer](#) and the [Division of Environmental Analysis \(DEA\) GIS Library](#)

to identify the locations of trust lands and other environmental layers. The Native American Liaison Branch internal webpage also contains a number of resources.

**Purpose:** For proper planning and diplomacy with tribes it is important to determine if proposed projects are within, adjacent, or in the general vicinity of Native American lands.

In the first box, please indicate if the proposed project is located within or near a tribal reservation, rancheria, or tribal trust land. A link to the [NALB Tribal lands Viewer](#) has been included for reference. This map is meant to be used in concert with other sources of tribal information available to the districts through their District Native American Liaison (DNAL) or District Native American Coordinator (DNAC).

The language, “near an Indian Reservation, Rancheria, or Tribal Trust Lands” is meant to identify project locations that may not intersect tribal lands but have the potential to impact transportation to and from nearby tribal communities or other areas of importance to Tribes. If a project has the potential to impact Tribal Lands, it is essential for Caltrans to take tribal concerns into consideration early in the planning process and to work collaboratively with the tribe. In addition, the scope of a project with the potential to impact Tribal Lands, may need to be adjusted to coordinate with Tribal transportation projects, Tribal Council priorities, tribal transportation departments, or to comply with any applicable tribal ordinances. There are a number of other legal and/or logistical considerations that might also need to be considered. The Tribal Relations Team can provide guidance when applicable.

<p><b>2-1-2 Does the Tribe have a Tribal Employment Rights Office/Ordinance (TERO) on file?</b>  <input type="checkbox"/> Yes   <input type="checkbox"/> No</p>	<p><i>If so, indicate if:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The TERO has been reviewed for required coordination</li> <li><input type="checkbox"/> Is this project on a route identified in the National Tribal Transportation Facility Inventory (NTTFI)?</li> <li><input type="checkbox"/> There is a related Memorandum of Understanding (MOU) between the District and the Tribe</li> <li><input type="checkbox"/> Caltrans has other MOUs with the Tribe; <i>Provide title and description or content</i></li> </ul>
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**Source:** The Native American Liaison Branch or the District Native American Liaison (DNAL) will be the primary source for information regarding Tribal Employment Rights Ordinances (TERO). The Native American Liaison Branch internal webpage also provides supplemental information.

**Purpose:** This section addresses projects that might affect the lands of Tribes that have Tribal Employment Rights Ordinances (TERO), or legislative acts that can be adopted by the governing body of a federally recognized tribe that, among other things, may include fees or hiring preferences for projects conducted on or near Tribal land. Because Tribal Governments have the right to establish and enforce their own laws on tribal lands, the Department honors TERO pursuant to the law, and as a result, pays TERO fees for the portion of projects on tribal lands and follows the tribe’s TERO provisions on Indian hiring preferences, as outlined in Caltrans Deputy Directive 74-R2 , when a portion of the project is on tribal lands. The details of the fees and hiring preferences are lined out in TERO MOUs, and your District Native American Liaison can help provide information on any negotiated agreements. If the tribe has a TERO, in the second box, please identify whether the Tribe’s TERO ordinance has been reviewed, whether there is a TERO MOU in place between the District and the Tribe, and any known project routes that the Tribe has included in their NTTFI.

<b>2-1-3 Have any tribes expressed environmental concerns related to the project?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Provide Tribal name(s) and details:</b>
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**Source:** The [Native American Cultural Studies Branch](#) or your District Native American Coordinator (DNAC) will be the primary sources of information regarding tribal environmental concerns.

**Purpose:** Tribal environmental/natural resource concerns are closely connected to tribal cultural heritage preservation concerns and warrant attention as part of the transportation scoping process. It is helpful to determine if there is potential for future transportation development initiatives in their area to affect natural spaces and/or cultural heritage sites of tribal significance. Planning considerations may need to take into account the protection of such areas from incremental encroachment or piecemeal destruction as a result of multiple land use and transportation initiatives. See also, Section 3-1-4 below. Caltrans' PQS Cultural Resources staff, particularly the District Native American Coordinators (DNACs), have access to in-house databases and cultural resources sensitivity modeling that can assist Planners on matters of tribal cultural and environmental sensitivity.

<b>2-1-4 Have any tribes expressed any other concerns related to the project?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Provide Tribal name(s) and details:</b>
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**Source:** Please consult your DNAL regarding information that may have been shared regarding the Tribe's planning or transportation priorities, to get a sense of any current grants or partnership projects, or to identify any existing MOUs. For example, some tribes have completed transportation plans, safety assessments, or identified needs on or near their lands that should be accounted for during planning efforts. The Caltrans Tribal Relations team engages with tribes on a regular basis and may be able to advise on other potential concerns the tribes may have as they relate to the scoping of a proposed transportation project.

**Purpose:** In order to comply with the Department's tribal government diplomatic responsibilities (referenced above), Caltrans must consult with Tribal Governments prior to making decisions, taking actions, or implementing programs that may impact their communities. Being aware of regional tribal issues during scoping helps Caltrans work with tribal partners more effectively and increases the overall success of project delivery. Caltrans Tribal Relations team and district counterparts can provide more information on general tribal transportation concerns and coordination opportunities.

<b>2-1-5 Who are the appropriate points of contact within the Tribe(s) for future coordination and consultation?</b>	<b>Name, title, phone number, e-mail:</b>
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**Source:** Contact your District Native American Liaison (DNAL) for information tribal contact information. District Native American Coordinator (DNAC) are also a source for tribal historic preservation officer contact information.

**Purpose:** Please list any known tribal contact(s) in the second box that would be appropriate for coordination and consultation. Just as you would work with a regional or local agency, it is important to also coordinate with our tribal transportation partners in the capacity at which they are willing and able to engage. Each tribal government is unique in terms of structure and who is best to contact for information and coordination. Large tribes may have greater staff capacity for transportation planning and programming and therefore might be more able to engage with Caltrans, respond to requests, or be more willing to participate in project coordination and

partnerships. Other tribes may have smaller numbers of tribal staff that perform multiple roles for their tribe and therefore have limited capacity for coordination with Caltrans. It is important to work with each tribe individually and become familiar with how the tribe is structured and operates to improve communication and collaboration between tribal and Caltrans staff.

## 2-2 Equity Considerations

2-2 EQUITY CONSIDERATIONS		
<p><b>2-2-1 Is the project located in or have the potential to affect equity priority communities (also known as disadvantaged or underserved communities)?</b></p> <p>You can use these links to identify if project is located in DAC area (additional data sources available in guidance):</p> <ul style="list-style-type: none"> <li>California Healthy Places Index Map</li> <li>CalEnviroScreen 4.0   OEHHA</li> </ul>	<p><input type="checkbox"/> Yes  <input type="checkbox"/> No  <input type="checkbox"/> Unknown (Defer to PID)</p>	<p><b>Describe the communities and any potential impacts.</b> (Consider age groups, income levels, race and ethnicity and potential positive or negative impacts etc.)</p>

**Purpose:** Understanding the characteristics (demographics, income, etc.) of the communities where the project is taking place is critical to identifying public engagement strategies, assessing potential impacts, and implementing improvements that enhance livability for all people. This assessment contributes to the project description and scope of work for the project. Factors to consider include identifying whether equity priority communities exist adjacent to or within the project area are disproportionately burdened by existing or proposed transportation improvements. Also, to consider is whether the project can mitigate past harms caused by transportation projects. It is important to note that defining these communities as Equity Priority Communities is aligned with Caltrans' commitment towards eliminating barriers to provide more equitable transportation for all Californians.

**Source:** To determine if project is located in an equity priority community, please use the following definitions and resources. It is to be noted that these sources are only examples to help demonstrate that the project is in an equity priority community. There may be others in development and the TPSIS preparer is encouraged to use more than one or others.

- **Median Household Income:** If the median household income of the project area is less than 80% of the statewide median based on the most current Census Tract level data from the 2019 American Community Survey 5-Year Estimates (<\$60,188), then the community may be considered a lower-income community. Communities with a population less than 15,000 may use data at the Census Block Group level. Unincorporated communities may use data at the Census Place level. Data is available at the [United States Census Bureau Website](#).
- **CalEnviroScreen:** An area identified as among the most disadvantaged 25% in the state according to the CalEPA and based on the [California Communities Environmental Health Screening Tool 3.0 \(CalEnviroScreen 3.0\)](#) scores. Score must be greater than or equal to 39.34. [CalEnviroScreen 4.0](#) is also available now.
- **National School Lunch Program:** At least 75% of public-school students in the project area are eligible to receive free or reduced-price meals under the National School Lunch Program. Data is available at the [California Department of Education website](#).
- **Healthy Places Index:** The Healthy Places Index includes a composite score for each census tract in the State. The higher the score, the healthier the community conditions, based on 25 community characteristics. The scores are then converted to a percentile to compare a census tract to other tracts in the State. A census tract must be in the 25th percentile or less to qualify as a disadvantaged community. The live map and direct data can both be found on the [California Healthy Places Index website](#).
- Federally Recognized Tribal Lands: Please use the [Native American Lands Viewer Map](#).
- [Caltrans Transportation Equity Index](#) (Coming soon): This tool is in development by the Caltrans Office of Race and Equity (CORE). It will provide an index to rank equity priority communities based on metrics that center around transportation equity.
- [2023 Active Transportation Program Plan Scoring Rubric](#)

- [2023 Active Transportation Program Guidelines](#)

If the answer is Yes, preparers **need to** describe the communities, identify positive or negative effects and identify strategies that may mitigate adverse impacts from the proposed project.

2-2-2 If 2-2-1 is Yes, what are their known mobility needs (consider access to opportunities/destinations)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown (Defer to PID)	Describe needs.
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**Purpose:** This section provides the opportunity to describe "known" mobility needs that draw from direct community feedback in existing plans, projects or public engagement activities. Mobility needs should not be assumed based on prior demographic research of the community but verified through a source. The "need" should address access to opportunities and destinations but be distinct from the possible "project components" (2-2-3). For example, if the analysis above determines a lower-income community that has a high demand for a lunch program, consider if a mobility need might involve Safe Routes to School.

**Additional Sources:**

- Results of previous outreach and engagement
- Tribal Traffic Safety Plan

2-2-3 Do opportunities exist to incorporate project components that reconnect divided communities, improve equitable access and mobility, or contribute to better public health?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown (Defer to PID)	Describe opportunities.
--	--	-------------------------

**Purpose:** The purpose is to demonstrate that this early assessment gave thoughtful consideration to these equity issues.

**2-3 Preliminary Public Engagement**

2-3 PRELIMINARY PUBLIC ENGAGEMENT	Source/Date Contacted	Additional Information
2-3-1 Which local partner agencies have been identified?		
2-3-2 Which other stakeholders, community-based organizations, advocates, or interest groups have been identified?		

**2-3-1 & 2-3-2:** Preparers **must** identify local partners and stakeholders, enter the names and mention how/when they have been contacted and any additional information such as commitments, outcome/concerns and communities' priorities.

**Purpose:** Identify names of Local Partners/Stakeholders/Public, how/when they were contacted and the partner/stakeholder commitments, concerns and/or community priorities. The objective of this field is to capture commitments, outcomes, concerns and/or community priorities which have been communicated to Caltrans prior to or during the project nomination process. It is essential public/stakeholder communications are consistent and continuous from early planning efforts to project construction. This field in the TPSIS is the mechanism for passing planning phase public/stakeholder comments and concerns into the PID Phase.

The intent of this field is to capture **previously completed** public/stakeholder engagement activities and does not require new public/stakeholder engagement activities to occur during project nomination. It is essential to note that this field does not restrict performing additional public/stakeholder engagement activities during the project nomination process. The Project Nomination Team is responsible for determining if public/stakeholder engagement activities are needed on a project-by-project basis.

**Source:** There are multiple locations where public outreach and engagement documentation may occur prior to TPSIS development including, but not limited to:

- Public Engagement Plans
- Corridor Plans
- California Transportation Plans
- Regional Transportation Plans
- Caltrans Active Transportation Plans
- Modal Plans (Freight, Mass Transportation, Aeronautics, etc.)
- State Highway System Management Plan
- Local and Regional Agency Transportation Plans
- Feasibility Studies
- Caltrans staff experience in proposed project area
- MPO and other regional transportation agency documentation

Relevant public and stakeholder comments and/or concerns from the previously mentioned sources should be captured under additional information field.

<b>2-3-3 What is the recommended Public Engagement Strategy for this project?</b>	<input type="checkbox"/> Inform	<input type="checkbox"/> Collaborate	<input type="checkbox"/> No Recommendation
	<input type="checkbox"/> Consult	<input type="checkbox"/> Involve	

**2-3-3 Purpose:** The objective of this question is to recommend a preliminary proposed approach to public outreach and engagement for the project. Every project is unique and requires a unique public/stakeholder engagement strategy. The Project Development Team in the PID phase will make the ultimate determination about the appropriate public engagement strategy in the PID phase. This section provides a recommendation based on the information available in the TPSIS. The four levels of Public Engagement Strategies categories are described below:

- **Inform** - Provide the public with factual information to help them understand the project or plan.
- **Consult** - Obtain feedback on issues, analysis, alternatives, or decisions.
- **Involve** - Work with the public throughout the process to ensure concerns are understood and considered.
- **Collaborate** - Partner with the public in all aspects of the process, including alternatives and preferred project components.

**Source:** Additional information on public engagement is available at the following links.

- Public Engagement Toolbox -
- Project Communication Handbook -

<b>2-3-4 Is the project likely to require translation and interpretation services?</b> <a href="https://www.fhwa.dot.gov/civilrights/programs/title_vi/lep_fourfactor.cfm">https://www.fhwa.dot.gov/civilrights/programs/title_vi/lep_fourfactor.cfm</a> <a href="https://data.census.gov/cedsci/">https://data.census.gov/cedsci/</a>	<input type="checkbox"/> Yes	<b>Describe.</b> (Include the percentages of LEP individuals in the census tract and their respective languages.)
	<input type="checkbox"/> No <input type="checkbox"/> Unknown (Defer to PID)	

**2-3-4 Purpose:** The objective of this question is to evaluate the potential need to contract a professional interpreting and/or translating service for any public meetings, announcements, advertisements, or documents relating to the project. This evaluation should be based on a Four Factor Analysis, consisting of the following four questions:

1. The number or proportion of LEP persons eligible to be served or likely to encounter the project.
2. The frequency with which LEP individuals come in contact with the project.
3. The nature and importance of the program, activity, or service provided by the project to people's lives.

4. The resources available and costs.

The number or proportion of LEP persons eligible to be served or likely to encounter the project can be determined by viewing LEP data from table C16001 from the 5-year American Community Survey (ACS) at the census tract level (see link to instructions below). FHWA recommends the following table be used to determine recommended provision of written language assistance.

Size of Language Group	Recommended Provision of Written Language Assistance
1,000 or more in the eligible population in the market area or among current beneficiaries	Translated vital documents
More than 5% of the eligible population or beneficiaries and more than 50 in number	Translated vital documents
More than 5% of the eligible population or beneficiaries and 50 or less in number	Translated written notice of right to receive free oral interpretation of documents.
5% or less of the eligible population or beneficiaries and less than 1,000 in number	No written translation is required.

LEP requirements can be divided into two types of services: interpretation and translation. Interpretation is the act of listening to something in one language (source language) and orally translating it into another language (target language), either in person or via telephone interpretation service. Translation is the replacement of a written text from one language (source language) into an equivalent written text in another language (target language).

**Source:** Instructions from FHWA about how to determine the number or proportion of LEP individuals can be found here:

[https://www.fhwa.dot.gov/civilrights/programs/title\\_vi/lep\\_fourfactor.cfm](https://www.fhwa.dot.gov/civilrights/programs/title_vi/lep_fourfactor.cfm)

U.S. Census Bureau website: <https://data.census.gov/cedsci/>

If you have Title VI questions, contact [title.vi@dot.ca.gov](mailto:title.vi@dot.ca.gov)

### Section 3: Plan and Document Review

This section provides a summary of recommendations and considerations identified from a comprehensive review of existing planning documents, datasets and scoping tools.

Preparers need to review information and sources provided for each category and review the plans and tools listed in this section, mark the plans that have been reviewed and provide recommendations and considerations in the appropriate box.

#### 3-1-1 District Traffic Safety Plans

District Traffic Safety Plans are under development. Please discuss with the District Safe System Lead for more information.

#### 3-1-2 Active Transportation Plans

Use [Caltrans Active Transportation \(CAT\) Plans](#) for more information regarding Active Transportation Plans and summarize the recommendations and considerations in the box.

#### 3-1-3 Broadband

Is there Caltrans-owned Broadband infrastructure within this project location?

Review the following map, under “Fiber Option Inventory” layer to respond:

<https://sv03tmcpo.ct.dot.ca.gov/portal/apps/webappviewer/index.html?id=7709b9ab85484fa9bcd181f77936af02>

In the "Summary of Recommendations and Considerations", mention if the fiber is "existing", "programmed", "proposed" or if there is "no fiber". If it is "proposed" or "no fiber" in the location, please fill Section 10.

### **3-1-4 Climate Change Planning**

California has been innovative and proactive in addressing climate change (GHG emissions and adaptation) by passing multiple Senate and Assembly bills and executive orders (EOs) including but not limited to AB32/SB32, AB2800, SB1 Section 2030(e), EO B-30-15, and EO N-19-19. The following information and resources are provided to assist in providing practitioners with information to demonstrate the key principles in the State's climate change goals. EO B-30-15 includes comprehensive measures to address many of the aspects identified in other laws, rules and executive orders related to climate change.

Executive Order B-30-15 included several key mandates for State agencies to consider climate change. Successful implementation requires early consideration and highlights the importance of identification of key elements in the TPSIS. When planning proposed projects, the following considerations should be documented, and the list of the following plans and information contained within will help Caltrans document that climate change was considered in all planning and investment decisions. Information contained in the plans and/or products listed below will inform the project scope, cost and schedule and should be outlined early in the process. Consideration of the following principles should be incorporated:

- All State agencies with jurisdiction over sources of greenhouse gas emissions shall implement measures, pursuant to statutory authority, to achieve reductions of greenhouse gas emissions to meet the 2030 and 2050 greenhouse gas emissions reductions targets.
- State agencies shall take climate change into account in their planning and investment decisions and employ full life-cycle cost accounting to evaluate and compare infrastructure investments and alternatives.
- State agencies' planning and investment shall be guided by the following principles
  - Priority should be given to actions that both build climate preparedness and reduce greenhouse gas emissions;
  - Where possible, flexible and adaptive approaches should be taken to prepare for uncertain climate impacts;
    - Actions should protect the state's most vulnerable populations; and
    - Natural infrastructure solutions should be prioritized.

SB1 Section 2030 (e) requires : "To the extent deemed cost effective, and where feasible, in the context of both the project scope and the risk level for the asset due to global climate change, the department and cities and counties receiving funds under the program shall include features in the projects funded by the program to better adapt the asset to withstand the negative effects of climate change and make the asset more resilient to impacts such as fires, floods, and sea level rise."

The California Coastal Commission (Coastal Commission) and local agencies with certified Local Coastal Programs (LCPs) have authority over projects which take place in the coastal zone from the California Coastal Act ([Public Resource Code, Division 20](#)) to ensure coastal hazards like sea level rise (SLR) are both adequately evaluated and addressed throughout the Caltrans project development process. The Coastal Commission bases its standard of review for project permit approval on the Chapter 3 policies of the California Coastal Act; Sections [30235](#), [30236](#), and [30253](#) focus on coastal hazards and shoreline development, and provide the primary basis for how the Coastal Commission considers SLR in proposed Caltrans projects. These policies requiring protection of life, property, and coastal resources are complimented by the aforementioned statutes like as [AB 2800](#), [SB1 2030\(e\)](#), and [SB 743](#) directing the transportation

system to mitigate, minimize, and adapt to climate change. It is important at this (TPSIS) stage to ensure that the needs to address specific Coastal Commission requirements are highlighted for proper scope and cost identification and further refined in the PEAR/ PID.

The following resources should be reviewed, and pertinent information included in the TPSIS.

- **Climate Change Vulnerability Assessments** provide analysis of potential climate change impacts to the State Highway System (SHS). The district vulnerability reports and maps should be reviewed, and high-level information provided here for climate stressors of concern to the proposed project location. See Section 8-2-2 for instructions for printing and attaching Vulnerability Web map.
- **Caltrans Climate Change Adaptation Priority Reports** are currently being developed for each Caltrans District, consult with your district report to determine Assets with high priority scoring for addressing climate risks.
- **Local climate action plans** may provide opportunities for Caltrans to collaborate with a local entity for GHG reduction measures. For example, does the city or county near the project area have an urban forestry goal or program for GHG reduction that Caltrans may contribute to if additional GHG mitigation is necessary. (Coolcalifornia.org and Google search of city/county climate action plans are helpful resources for this effort)
- **Locally Adopted Transportation Plans** briefly describe any adaptation option measures that have been recommended for implementation in an existing local, county, or regional climate vulnerability and adaptation plan. Consider discuss whether the proposed project can include design elements consistent with recommended strategies? (Example: short and long-term adaptation pathways and strategies may include protect, accommodate or abandon.
- **The EIR (Greenhouse Gas Analysis) associated with the applicable RTP/SCS** for the proposed project location may include requirements for projects to implement GHG reduction measures? Copy and paste the applicable measures into the appropriate area of the TPSIS.

### 3-1-5 Cultural/Historic Preservation Scoping Tools

Cultural resources issues tend to be a critical path item during environmental review and project delivery, so the consideration of cultural resources issues during earlier planning phases is tied to better, more efficient project delivery processes. In order to best consider potential effects to important cultural resources during early Planning phases, Transportation Planner staff should seek input from the Department's Professionally Qualified Cultural Resources Staff. Caltrans' Professionally Qualified Staff (PQS) are Cultural Resources staff who meet the Secretary of Interior's Professional Qualifications Standards for Cultural/Historic Preservation disciplines. Statewide, Caltrans employs approximately 100 Cultural Resources staff among the HQ Cultural Studies Office and the twelve Districts. PQS Staff have a number of scoping tools available to assist Planners. Planners can contact the [Cultural Studies Office](#) if they need assistance identifying the appropriate District PQS staff to contact.

Upon request, Caltrans' PQS Cultural Staff are available to assist Transportation Planning staff with cultural resources scoping efforts for a variety of Planning Areas by reviewing in-house cultural resources inventory data for all Caltrans' right-of-way within the State Highway System for all twelve Caltrans' Districts. This inventory of cultural data is known as the **Caltrans Cultural Resources Database (CCRD)**, which is *only* accessible to Caltrans PQS Staff, due to confidentiality considerations. The CCRD contains information about all known prehistoric and historic era cultural resources, which PQS staff can use to assist and inform Planners during scoping efforts to identify areas of cultural resources sensitivity or concern. Caltrans' PQS Cultural Staff also have access to in-house Geoarchaeological Sensitivity Modeling tools (also confidential) to help

predict potential archaeological site sensitivity at a regional scale or at a more focused planning area scale.

Transportation Planning staff may also access some non-confidential cultural resources data without the assistance of PQS Cultural Resources staff through use of the Caltrans [Division of Environmental Analysis' \(DEA's\) GIS Library](#). The *Cultural Resources Tab* within the DEA GIS Library contains a variety of non-confidential cultural resources data layers that may help with scoping Planning Areas and/or informing Planning decisions, including Caltrans' Historic Bridge Inventory; properties listed on the National Register of Historic Places, locations of Tribal Trust Lands, and more. It is highly recommended that Planning Staff seek guidance from PQS Cultural staff to assist in interpreting the cultural resources data in the GIS library. The DEA GIS Library is accessible internally to all Caltrans' staff statewide.

When scoping for cultural/historic preservation issues during earlier Planning phases it is very important to coordinate with relevant Tribal Historic Preservation Officers (THPOs) and/or tribal cultural resources representatives to obtain early input about potential tribal cultural heritage considerations within a given Planning Area or region. PQS Cultural staff, and in particular, the District Native American Coordinators (DNACs), are also available to assist Planning Staff in conducting outreach to tribal cultural leaders and obtaining input from the appropriate, culturally affiliated tribal governments on topics of tribal cultural sensitivity. It is helpful to determine if tribes have any broader concerns about the potential for future transportation or related land use development initiatives in their area to affect natural spaces and/or cultural heritage sites of tribal significance. Planning considerations may need to take into account the protection of such areas from incremental encroachment or piecemeal destruction as a result of multiple land use and/or transportation initiatives. It is recommended that Planning Staff seek guidance from the Native American Cultural Studies Branch for more information on this topic.

### **3-1-6 Rail and Mass Transportation Planning**

**California State Rail Plan** – The California State Rail Plan is a strategic plan with operating and capital investment strategies that lead to a coordinated, statewide travel system. The Rail Plan is an important element in the comprehensive planning and analysis of statewide transportation investment strategies detailed in the California Transportation Plan. In concert with the CTP and other model plans, the Rail Plan helps clear the air, invigorate our cities, and provide the mobility that Californian's need in the future.

**Statewide Transit Strategic Plan** – California's Statewide Transit Strategic Plan is one of the six long-range modal plans required under the framework of the CTP. Taken together, these modal plans will provide the state with a cohesive, unified vision for improving its transportation infrastructure and ensuring Californians' mobility in the decades ahead. The Transit Plan aims to give Caltrans, the California State Transportation Agency, and other public agencies the tools, best practices, data, and authority they need to offer seamless public mobility, better coordinate with each other, and meet the State's shared mobility needs.

### **3-1-7 Local Coastal Program**

Projects within the jurisdiction of the California Coastal Commission or Local Coastal Program will likely require additional project considerations that should be identified in Section 1 needs/opportunities and risk/ challenges. Link and title of the applicable Local Coastal Program should be included here and any key policies or adopted model language that would affect project scope and cost should be listed and considered when developing the preliminary project scope.

### 3-1-8 System Planning

System planning is Caltrans' long-range (20-25 year) transportation planning process that evaluates existing and future operating conditions on the State Highway System (SHS) and recommends enhancements to improve system operations and mobility. California Government Code Section 65086, states "The Department of Transportation, in consultation with transportation planning agencies, county transportation commissions, counties, and cities, shall carry out long-term State Highway System planning to identify future highway improvements."

The purpose of system planning is to provide a long-term look at the SHS so that improvements made to the system will address current and future issues. System planning is a continuous, comprehensive, and cooperative process that considers the entire transportation system, including highways, local roads, transit, freight, and non-motorized modes of transportation.

System Planning documents that need to be reviewed and considered are:

**Interregional Transportation Strategic Plan (ITSP)** – This document provides guidance for the identification and prioritization of interregional transportation projects. It also guides investments on high priority interregional routes. Mark check if the project is within or part of a Strategic Interregional Corridor. Describe and identify Interregional Transportation Priorities and Priority Interregional Facilities that are within the project limits or that may impact the project.

**Source:** [Interregional Transportation Strategic Plan \(ITSP\)](#)

Corridor Plans including **Transportation Concept Reports (TCR)**, **Corridor System Management Plans (CSMP)**, and **Comprehensive Multimodal Corridor Plans (CMCP)** – These are long-range comprehensive transportation planning documents that describes the existing condition of the Corridor, analyzes the performance of the Corridor, identifies the needs of the Corridor, and provides strategies and goals to achieve the operational and facility concept of the Corridor. Mark check if there are projects or transportation needs identified in any of the identified Corridor Plans. Summarize and describe any potential transportation needs and strategies identified in the Corridor Plans that are within the limits or nearby this project.

**Source:** [District System Planning Office TCRs, CSMPs and CSMP library or webpage](#)

### 3-1-9 Tribal Planning

Some tribes have completed transportation plans which identify needs on or near their lands that should be accounted for during planning efforts. Please contact your District Native American Liaison for more information on tribal planning documents.

**Source:** Native American Liaison Branch

## Section 4: Caltrans Stakeholder Information

Provide name and phone number of all the Caltrans Stakeholders relevant for the project.

## Section 5: Climate Change Considerations

5-1 CLIMATE CHANGE CONSIDERATIONS	Comment/Action
<p>5-1-1 Using the Caltrans climate change considerations tool kit, identify potential GHG emission and climate change-related mitigation options at the proposed project location. Attach toolkit as an appendix and check GHG reduction measures and climate change-related adaptation measures that could apply to the proposed project for consideration.</p>	<p>Completed Caltrans climate change considerations toolkit has been attached?  <input type="checkbox"/> Yes  <input type="checkbox"/> No                      If no, Describe</p>

**Purpose:** Measures to reduce GHG emissions and plan for adaptation to climate-specific stressors is critical to successful scoping and incorporation of climate change consideration into the

proposed project. Early Identification of GHG reduction measures that should be considered in the project scope to assist in Caltrans progress towards helping the State reach GHG reduction targets. Early identification of potential adaptation measures at the project location assists Caltrans in meeting Executive Orders and legislation to include climate change consideration in every project.

**Source:** The “GHG reduction measures toolbox for internal use in Caltrans project development” document that has been released by the Division of Environmental Analysis (Office of Environmental Management) for your use.

<p>5-1-2 Using the District Vulnerability Assessment appropriate for the proposed project area, identify the potential climate stressors that could affect transportation assets within the project limits. <i>Using the vulnerability assessment interactive Webmap; print and attach map of potential project site vulnerability</i></p>	<input type="checkbox"/> Temperature <input type="checkbox"/> Precipitation <input type="checkbox"/> Wildfire <input type="checkbox"/> Other: <input type="checkbox"/> Sea-Level Rise <input type="checkbox"/> Storm Surge <input type="checkbox"/> Cliff Retreat
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**Purpose:** Identify potential climate stressors that may need to be considered in the proposed project scope or highlighted in the project risk register. Use the District Vulnerability Assessment ArcGIS Webmap relevant to the project location to identify if any of the 6 climate stressors (Temperature, Precipitation, Wildfire, Sea Level Rise, Storm Surge or Cliff Retreat) are present or could occur through end-of-century at the proposed project location.

**Source:** [District-specific Climate Change Vulnerability Assessments: Summary Report, Technical Report ArcGIS Webmap](#)

<p>5-1-3 Are there potential climate risks to major assets within the project area? <i>[e.g. Bridge potentially at risk of SLR inundation, stretch of highway at risk for high temp, and wildfire- consider appropriate materials]</i></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Describe.</i>
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**Purpose:** To briefly describe potential climate risks to major assets within the project area. As adaptation measures applied to existing assets may increase the cost of project, early identification of areas that need further study is important. These assets can be identified through the Vulnerability Assessments, Adaptation Priorities Reports and District knowledge. Answering yes will notate and identify these specific assets early in the project development process. If no, this indicates that no major assets within the proposed project location have been identified as at risk due to climate stressors.

**Source:** Please refer to the following links for more information:

- o [District-specific Climate Change Adaptation Priority Reports](#)

<p>5-1-4 Is the project located in the Coastal Zone Boundary, Local Coastal Program Area (<a href="https://www.coastal.ca.gov/maps/">https://www.coastal.ca.gov/maps/</a>), or within the San Francisco Bay Conservation and Development Commission (BCDC)? <a href="https://bcdc.ca.gov/bcdc-cities-jurisdiction.html">https://bcdc.ca.gov/bcdc-cities-jurisdiction.html</a></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Describe.</i>
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**Purpose:** Projects in the coastal zone, or within the jurisdiction of the California Coastal Commission, Local Coastal Program (LCP), the San Francisco Bay Conservation and Development Commission, or the Legal Delta—under the jurisdiction of the Delta Stewardship Council—will likely require additional project considerations. If a project impacts any of the following coastal resources: Environmentally Sensitive Habitat Areas, Public Access, Coastal Hazards, Agricultural Resources, Wetlands, and Coastal Scenic and Visual Resources—then additional project scope resourcing needs should be identified early in the TPSIS for further development in the PEAR/ PID. Early identification at the TPSIS stage will highlight the need for proper allowances for funding and staff resources for preparation of technical studies, project design, and alternatives. GIS information on coastal zone boundaries, coastal resources, SLR, etc is in the DEA GIS Library below. For example, consistency with coastal hazard policies would require consideration of alternatives to hard structural armoring. Early coordination with the District Coastal Liaison is highly recommended during the preparation of the TPSIS.

**Source:** Please use the following links for more information:

- [DEA Coastal Program Website](#)
- [Bay Conservation Delta Commission website](#)
- [Delta Stewardship Council](#)
- [DEA GIS Library](#)
  - o [District-specific Climate Change Vulnerability Assessments: Summary Report, Technical Report ArcGIS Webmap.](#)

## Section 6: Smart Mobility, Active Transportation and Transit

Use of this checklist is initiated during the earliest phase of a project, when information about existing conditions and needs may be limited. As the project progresses, and more detailed information becomes available, the preparer will be able to complete the checklist and continue to refine earlier answers, to give an increasingly accurate indication of needs and opportunities for Complete Streets features.

For the purposes of this section, the recommended "project area" is within 0.5 mi (800 m) for pedestrian facilities and 1.0 mi (1600 m) for bicycle facilities. In some circumstances, bicyclists may travel up to 7 miles for a unique generator, attraction or event. These special circumstances may be considered and described as appropriate.

**The Preparer should have expertise in the subject matter and be able to effectively work with and coordinate comments/responses with involved District Groups.**

### 6-1 Applicability of Checklist

6-1 APPLICABILITY OF CHECKLIST <b>(REQUIRED)</b>	
6-1-1 Is the project located entirely on a facility where bicyclists and pedestrians are legally prohibited and the project does not involve a shared use path, pedestrian/bicycle structure or work impacting a local road crossing or interchange? <i>(i.e., project including freeway mainline and ramp work where the project freeway segment legally prohibits bicyclists and pedestrians per the MUTCD.)</i> If no, continue, if yes, you may stop here.	<input type="checkbox"/> Yes <input type="checkbox"/> No
6-1-2 Is the primary project purpose to address assets that are outside of the roadbed where pedestrian and bicycle travel is not affected, and construction will not affect future pedestrian and bicycle facilities? <i>(i.e., culvert outfalls, storm water treatment facilities, bridge substructure or scour mitigation, planting or vegetation removal, retaining walls, etc.)</i> If no, continue, if yes, you may stop here.	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Purpose:** Identify if the questions in this section are applicable to the project. If the answer to any of these two questions is "yes", the project would be exempt from including Complete Streets elements. These two questions are also included in the [Complete Streets Decision Document \(CSDD\)](#).

**Source:** To identify if the project is located entirely on a facility where bicyclists and pedestrians are legally prohibited, see [California State Highways Prohibited and Not Prohibited to Bicycles Map](#). The map is created on Oct 6, 2017 and updated on Jun 28, 2019. The map can also be found in the SMF Mapping Application that is available on Active Transportation and Complete Streets Office webpage.

To identify if there is an existing pedestrian/bicycle structure in the project area, please use the Active Transportation Asset Inventory Pilot (ATAIP) data which is accessible through SMF Mapping Application and has the sidewalks, bikeways, and crosswalks asset data and condition rating.

### 6-2 Place Types

6-2 PLACE TYPES <b>(OPTIONAL from here on)</b>	Comment/Action
6-2-1 Identify the Smart Mobility Framework Place Type(s) surrounding the project limits.	<input type="checkbox"/> Central Cities <input type="checkbox"/> Urban Communities <input type="checkbox"/> Suburban Communities <input type="checkbox"/> Rural Areas <input type="checkbox"/> Protected Lands and Special Use Areas

**Purpose:** Identify the place type in project area. The answer to this question can help with identifying place type related considerations in Q 6-2-4.

**Source:** The statewide map for SMF Place Types can be found in the SMF Mapping Application that is available on Active Transportation and Complete Streets Office webpage. You can also use the methodology described in [Smart Mobility Framework Guide 2020](#) to determine the project area's place type. Please note that the statewide place type map is at the census tract's level and based on the project's scale, you might need to do the analysis and identify the appropriate place type for the project area.

<p>6-2-2 Are there any -existing or proposed- Pedestrian/ Bicyclist/ Passenger Rail/Transit Trip Generators in or adjacent to the project area?</p>	<input type="checkbox"/> Schools <input type="checkbox"/> Town Centers <input type="checkbox"/> Shopping Centers <input type="checkbox"/> Bus Stops	<input type="checkbox"/> Large Employment Businesses <input type="checkbox"/> Shared-use trail access/parking. <input type="checkbox"/> Public Transit /Passenger Rail Facilities <input type="checkbox"/> Health/Medical Facilities <input type="checkbox"/> Other
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**Purpose:** To identify Pedestrian/ Bicyclist/ Passenger Rail/Transit Trip Generators which would show the need to include Complete Street elements in the project area.

A trip generator, in this document, refers to both origins and destinations for Pedestrian/ Bicyclist/ Passenger Rail/Transit Trips:

- **Residential Areas:** Indicate any general areas of dense residential housing.
- **Parks:** Include areas that would attract people, whether officially designated as a park or not.
- **Recreational Areas:** Examples include athletic fields, dog parks.
- **Religious Facilities.**
- **Schools** (including public and private schools, colleges, universities, daycare or other educational institution).
- **Health / Medical Facilities.**
- **Town Centers:** typically, would include areas where Town Halls, Libraries and other public facilities exist.
- **Shopping Centers:** especially centers with businesses where non-motorized customers might be expected (restaurants, bookstores, drug stores, etc.).
- **Large Employment Businesses:** Factories, large office buildings, hospitals, government offices.
- **Bus Stops.**
- **Public Transit Facilities:** train/bus stations, airports.
- **Shared-use trail access / parking.**
- **Other:** other known facilities expected to generate or attract non-motorized users like mixed-use development, hotels, etc.

**Source:** SMF Mapping Application will include data layers for some of the Trip Generators listed above. For other trip generators, you can use the Google maps.

<p>6-2-3 Check all that apply:  <input type="checkbox"/> the highway segment functions as a "Main Street" or a "Safe Route to School"  <input type="checkbox"/> the project provides unique or primary access into or out of any of the trip generators or between communities  <input type="checkbox"/> the project provides unique or primary access across a river, highway corridor or other natural and/or man-made barrier</p>
--

**Purpose:** If any of these three boxes are checked, it will show a potential need/opportunity to include Complete Street elements into the project. For example, one possible treatment for Main Street or Safe Route to Schools, could be Road Diet. Currently, Caltrans does not have a policy for Road Diet, so it will be considered on a case-by-case basis. In some districts, Planning has been tasked with taking the lead, at least initially, when road diet opportunities are identified, with support from Operations, Design, and Traffic Safety closely involved in any decision-making.

**Source:** SMF Mapping Application will include a TSN-based GIS layer for Main Streets and also data layers for some of the Trip Generators listed under question 6-2-2. More information on Safe Routes

to School can be found on Caltrans DLA's safe Routes to School Programs and [Safe Routes Partnership](#).

**6-2-4 Summary of place type related considerations (see Smart Mobility Framework Guide)**  
*Add text describing place type considerations.*

**Purpose:** SMF Implementation Guide 2022 has a whole chapter on Place Type and for each place type, you can find information on Place Type's primary characteristics, Evolution of Place Type, Mobility issues and opportunities, Smart Mobility Vision for Place Type, Typical barriers to achieving smart mobility, Links to potential solutions in the form of Implementation Briefs. You can also use the list of general considerations in the [Smart Mobility Framework Guide 2020](#).

**Source:** The Smart Mobility Framework (SMF) Implementation Guide and Mapping Application 2022 and Smart Mobility Framework Guide 2020 are posted on Active Transportation and Complete Streets Office internal webpage.

### 6-3 Bicycle, Pedestrian, Rail and Transit Conditions

This section is generally talking about Current Condition. If there are existing facilities in the project area, the preparer would need to pay more attention to condition of existing facilities and improving poor and fair assets to good condition. Also, they can think of closing the gaps in the Bike and Ped network.

6-3 BICYCLE, PEDESTRIAN, RAIL AND TRANSIT CONDITIONS	Comment/Action
6-3-1 Identify existing bicycle and pedestrian facilities within project limits.	<input type="checkbox"/> Bicycle/Pedestrian Accessibility <input type="checkbox"/> Curb Ramps <input type="checkbox"/> Bicycle Lane <i>Choose an item.</i> <input type="checkbox"/> California Coastal Trail <input type="checkbox"/> Backpacking/Hiking/Equestrian Trail <input type="checkbox"/> Signage <input type="checkbox"/> Shoulder <input type="checkbox"/> Green Striping <input type="checkbox"/> Sidewalks <input type="checkbox"/> Bike Boxes <input type="checkbox"/> Other: <input type="checkbox"/> Two-Stage Turn Boxes

**Purpose:** This section (6-3) will focus on the Current Condition. If there are existing facilities in the project area, there would be opportunities to improve poor and fair assets to good condition. Closing the gaps in the Bike and Ped network would be another use of this section.

**Source:** SMF Mapping Application will include data layers for some of the bicycle and pedestrian facilities listed above.

6-3-2 Identify physical and/or perceived impediments for bicyclists and pedestrians.	<input type="checkbox"/> Narrow Shoulders <input type="checkbox"/> Utility Boxes <input type="checkbox"/> Narrow Sidewalks <input type="checkbox"/> High Vehicle Speeds <input type="checkbox"/> Connectivity Gaps <input type="checkbox"/> AADT <input type="checkbox"/> Curbs and Gutters <input type="checkbox"/> Other:
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**Purpose:** To identify physical and/or perceived impediments for bicyclists and pedestrians that can show an opportunity for including Complete Streets elements in the project. Other impediments can be excessive grade, limited width of roads/bridges, gaps or need for sidewalks (indicated by worn foot paths), utility poles or other appurtenances restricting access.

**Source:** SMF Mapping Application will include data layers related to some of the checkboxes for this question (shoulders width, sidewalks width, CAT Plan LBN Data, Posted Speed, and AADT).

6-3-3 Are there any complete streets assets including Bikeways (Class I – IV), Sidewalk, and Crosswalk, in Fair or Poor condition, in the project area?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.
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**Purpose:** If there are any complete street facilities in poor or fair conditions, the project scope can include facility improvement (to good condition).

**Source:** Use the Active Transportation Asset Inventory Pilot (ATAIP) data which is accessible through SMF Mapping Application and has the sidewalks, bikeways, and crosswalks asset data and condition rating. Please note that ATAIP is limited to the three Active Transportation core assets (Bikeways, Sidewalks, and Crosswalks) and doesn't capture other Complete Street Assets (like Transit related facilities). The data can also be found on the Active Transportation and Complete Streets Office internal webpage or the [Statewide Asset Management Viewer \(AM Map Portal\)](#).

<b>6-3-4 Design Year ADT</b>	<input type="checkbox"/> <2,500	<input type="checkbox"/> 2,500-5,000	<input type="checkbox"/> 5,000-10,000	<input type="checkbox"/> >10,000
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**Purpose:** The Design Year ADT categories here are based on the Contextual Guidance for the Selection of Bicycle Facilities and can help in selection of the bikeway classes (I-IV) - Q:6-4-6. Design Year ADT (associated with the design year of a specific project) is a future horizon year and would not be easily available at the pre-PID stage or would need to be requested by the district forecasting unit when the PID phase is open. Some districts are using latest available AADT when applying the Contextual Guidance as a stand-in until Design Year ADT data can be made available during the PID stage or later.

Annual Average Daily Traffic (AADT) is the total volume for the year divided by 365 days. The traffic count year is from October 1st through September 30th. This traffic volumes feature class containing Traffic Volumes (also known as Traffic Counts) on California state highway network created from 2018 AADT excel spreadsheet file maintained by Caltrans, Division of Traffic Operations.

**Source:** SMF Mapping Application will include data layers for AADT and ADT. You can also use the [AADT Map and Data](#).

<b>6-3-5 Posted Speed</b>	<input type="checkbox"/> 15-20	<input type="checkbox"/> 25-30	<input type="checkbox"/> 35-40	<input type="checkbox"/> >45
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**Purpose:** Like the previous question, the Posted Speed categories here are based on the Contextual Guidance for the Selection of Bicycle Facilities. The result can help in selection of the bikeway classes (I-IV) in Q 6-4-6.

**Source:** SMF Mapping Application will include a TSN-Based data layers for Posted Speed (Speed Limit). Another approach would be to use street view or similar imagery for posted signs if no other data is available.

<b>6-3-6 Level of Traffic Stress (LTS)</b>	<b>Bicycle LTS:</b> <input type="checkbox"/>	<b>Pedestrian LTS:</b> <input type="checkbox"/>
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**Purpose:** If the LTS is high (3 or 4), there might be a need to improve safety for bicyclists and pedestrians (for example by using facilities that are physically separated from motor vehicle traffic)

**Source:** SMF Mapping Application will include CAT Plan-Based data layers for LTS.

<b>6-3-7 Identify existing Rail and transit facilities within the project vicinity/ corridor.</b>	<input type="checkbox"/> Rail and Transit Stops	<input type="checkbox"/> Active Rail/Transit Line	<input type="checkbox"/> Park and Ride Lot
	<input type="checkbox"/> Connections to other services	<input type="checkbox"/> Signal Priority	
	<input type="checkbox"/> Seamless Transfer Opportunities	<input type="checkbox"/> Other:	

**Purpose:** To identify opportunities to improve access to transit.

**Source:** SMF Mapping Application will include data layers for some of the rail and transit facilities listed above. You can also use these links:

[Park and Ride Lots Map:](#) Park and ride lots provide a location for individuals to park their vehicles to join carpools and to access bus and rail services, thereby taking vehicles off local streets and roads and the State Highway System (SHS).

[California Rail Systems Web Mapping Application](#) is a statewide map which displays the various rail systems, routes and stations of California. California Rail Systems also displays miscellaneous features that pertain to the rail system but are not routes or stations.

[California State Rail Plan](#) is a strategic plan with operating and capital investment strategies that lead to a coordinated, statewide travel system.

[Statewide Transit Strategic Plan](#) aims to give Caltrans, the California State Transportation Agency, and other public agencies the tools, best practices, data, and authority they need to offer seamless public mobility, better coordinate with each other, and meet the State's shared mobility needs.

#### 6-4 Bicycle, Pedestrian & Transit Needs/Opportunities

6-4 BICYCLE, PEDESTRIAN & TRANSIT NEEDS/OPPORTUNITIES	Comment/Action	
6-4-1 Are there opportunities to improve safety for bicyclists and pedestrians with Complete Street features?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.

**Purpose:** to identify opportunities to improve safety for bicyclists and pedestrians using Complete Street features. This will encourage shifting to non-motorized modes.

Is there a perceived pedestrian safety or access concern like evidence of pedestrian activity (e.g., a worn path) and no or limited pedestrian infrastructure, narrow shoulder in rural areas, ... that could be addressed by the use of pedestrian safety tools (Including bulb outs, raised pedestrian refuge medians, corner islands, raised crosswalks, mid-block crossings) or Complete Street features like:

- Sidewalk curb ramps and crosswalks
- Shoulder condition and width
- Pavement markings for pedestrians and bicyclists
- Signing

**Source:** For a list of treatments you can refer to Pedestrian Safety Countermeasure Toolbox and presentation slides for the Pedestrian Safety Countermeasures Training

6-4-2 Identify any pedestrian, bicycle or transit needs in/linking to the project area as identified in an existing Bicycle/Pedestrian Plan or comprehensive planning study for the corridor.	Describe.
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**Purpose:** Listing the bicycle and pedestrian needs as identified in an existing Bicycle/Pedestrian Plan or comprehensive planning study for the corridor.

**Source:** Please refer to the question 3-1-1 for a summary of needs, recommendations, and considerations identified from a comprehensive review of existing planning documents, datasets and scoping tools.

6-4-3 Is there a public/partner identified need for bicycle/pedestrian/ transit or "way finding" signs that could be incorporated into the project?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Click or tap here to enter text.
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**Purpose:** Identifying public/partner need that could be incorporated into the project.

**Source:** This information would be uploaded to the Active Transportation and Complete Streets Office webpage. Currently, the data is stored in the Clowder Tool (online Public/Partner Map-Based Survey Tool and Location-Based Needs) which identifies the locations where bicycle and pedestrian improvements are needed on or near the State Highway System. Please note, Clowder Tool doesn't capture transit or way finding sign needs.

6-4-4 Provide recommendations to address physical and/or perceived impediments for bicyclists and pedestrians (identified in 6-3-2) within project limits".	<input type="checkbox"/> Yes <input type="checkbox"/> No	Click or tap here to enter text.
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**Purpose:** To provide recommendations and address the impediments identified in 6-3-2.

**Source:** NA

6-4-5 Is there any opportunity to improve transit on state owned roads or improve access to transit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Click or tap here to enter text.
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**Purpose:** To identify opportunities to improve transit or access to transit. Examples could include bus-on-shoulder, utilizing high visibility crosswalks near bus stops, bike racks at major transit stops, bus stops, shelters, pullouts, etc.

**Source:** NA

6-4-6 Preferred Bikeway Facilities	<input type="checkbox"/> Class I <input type="checkbox"/> Class II <input type="checkbox"/> Class III <input type="checkbox"/> Class IV <input type="checkbox"/> Standard Shoulder or Shared Lane
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**Purpose:** Based on the responses to the questions 6-3-4 and 6-3-5, you can identify the preferred bicycle facility in the project area.

**Source:** Refer to the Contextual Guidance for the Selection of Bicycle Facilities. The memo was sent to District Planning Deputies on March 11, 2020. The effort was a collaboration between Planning, Design, Traffic Operations, and Sustainability.

**Section 7: Planning and Environmental Linkage Considerations**

Early identification of environmental issues that may affect the project scope, cost and schedule should be broadly considered early in the process. Identification of some key issues prior to the PEAR or PID can assist the district with identifying and prioritizing projects based on available funding resources. These efforts provided earlier in the process can also assist in streamlining the overall project delivery process. The questions in Section 7 will assist in identification of some of these key issues.

Planning and Environmental Linkages (PEL) is a FHWA initiative focused on streamlining project delivery and improving environmental outcomes. The purpose of PEL is to integrate environmental, community, and economic goals early into transportation planning and to use information gathered during transportation planning to inform the environmental review process. Decisionmakers can then use and rely on planning analysis, studies, decisions, or other information developed in planning process for the project development and environmental review processes of transportation projects. PEL aims to create a more unified decision-making process, reduce duplication of efforts, and more informed project-level decisions.

The development of this section will improve development of a robust Purpose and Need statement, in order to make better decisions pertaining to the project’s scope, cost and schedule. This document will also provide context and baseline data of natural and cultural resources that will help to develop the Preliminary Environmental Analysis Report during PID development.

**7-1 Air Quality, Wildlife, and Natural Habitat Considerations**

7-1 AIR QUALITY, WILDLIFE, AND NATURAL HABITAT CONSIDERATIONS
<p>7-1-1 Check all that apply:</p> <input type="checkbox"/> Air Quality – proposed project is located in a Federal non-attainment or attainment maintenance area <input type="checkbox"/> Project is within identified Wildlife Corridors in a Habitat Conservation Plan, South Coast Wildlife Linkage or California Essential Habitat Connectivity Plan. <input type="checkbox"/> Proposed project is located within or near any lands protected under a National Scenic Rivers Act, US Fish and Wildlife Services such as Critical Habitat, National Wildlife Refuge System, etc., or within the boundaries of other resource agencies such as HCPs, USFS or BLM designated critical habitat areas or Habitat Conservation Plans

**Purpose:** consideration of some of the key questions in Section 7-1-1 may alter the scope or potential location of the proposed project, and or the level of consultation required by resource agencies.

All federal actions must further the purposes of the Clean Air Act, i.e. assist in attaining clean air standards. maintaining air quality standards and ensuring projects meet air quality “conformity” requirements. Projects proposed within areas of Federal non-attainment or attainment maintenance areas for criteria pollutants will require coordination with The Caltrans Air Quality, Environment and Health Branch and potentially the Statewide conformity working group.

Marked checkbox indicates further studies and early engagement with various Resource Agencies such as USFS, CA Department of Fish and Wildlife, US Fish and Wildlife Services and may require extensive technical studies. Additionally, the PDT should identify this as a risk for purposes of project scoping. If the project requires technical studies with seasonal constraints indicate this action as a risk in the Risk Register. And the scope of work requires early engagement with the appropriate Regulatory Agency to determine necessary technical studies for approval of the project.

Marked checkbox indicates further studies and development of species lists through the California Department of Fish and Wildlife BIOS and RareFind databases and the US Fish and Wildlife Services IPAC species list.

**Source:** Information regarding Air Quality Conformity can be found at [DOTP Air Quality, Environmental and Health page](#)

CDFW’s Areas of Conservation Emphasis (ACE) has updated the connectivity map and includes regional connectivity projects (many more than South Coast Linkages). Caltrans can decide but Ranks 5 (“Irreplaceable and Essential Corridors”) and 4 (“Conservation Planning Linkages”) would be good for identifying corridors. The data also identifies if there is a regional connectivity plan, CA Essential Habitat, etc., within the hexagon (“Linkage datasets” in the data are coded to the connectivity dataset available in BIOS). The ACE Connectivity data will be continuously updated with new data sets and eventually animal migration routes. It would serve as a “one-stop shop” for Transportation planners and Environmental planners. The factsheet is located here under the connectivity tab. In addition, CDFW is now publishing priority wildlife barriers.

<p><b>7-1-2 Are any of the following Officially Designated Habitat Types located within or near the proposed Project Location?</b></p> <p><input type="checkbox"/> Wetlands</p> <p><input type="checkbox"/> Riparian or Stream Habitats</p> <p><input type="checkbox"/> Jurisdictional Waters</p> <p><input type="checkbox"/> Important Bird Areas</p> <p><input type="checkbox"/> Important Rare Plants Areas</p> <p><input type="checkbox"/> Natural Communities of Conservation Concern</p> <p><input type="checkbox"/> Environmentally Sensitive Habitat Areas</p>	<p><i>If so, describe here:</i></p>
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**Purpose:** Marked checkbox indicates further technical studies and development of species lists through USFWS and the California Department of Fish and Wildlife BIOS and RareFind species lists. If the project requires technical studies with seasonal constraints indicate this action as a risk in the Risk Register. Please note candidate species are not included in these species lists and regulatory revisions for jurisdictional waters are dynamic and updates are constant, for the most recent changes contact your District Biologist

**Source:** Please refer to the following links for more information:

- [CNDDDB Maps and Data](#)
- CDFW RareFind 5 is an application for known occurrences for State listed and special status species and sensitive natural habitats. The website allows subscribers and non-subscribers to complete complex queries and reporting of CNDDDB data. Users can easily maneuver between RareFind 5 and the BIOS Viewer and it is very useful for those subscribers without access to GIS software.

- USFWS [IPaC](#) is an application for known occurrences for Federally listed species, critical habitat, migratory birds or other natural resources that may be impacted by your project. Using the map tool, explore other resources in your location, such as wetlands, wildlife refuges, GAP land cover, and other important biological resources.
- [Environmental GIS Library](#)
- The following datasets can be found on the DEA GIS Library under the Water tab:
  - Wild & Scenic Streams
  - Flowlines (Rivers, Streams, Canals)
  - National Wetland Inventory
- The [Wetlands mapper](#) is designed to deliver easy-to-use, map like views of America's Wetland resources.

7-1-3 Is there an identified fish passage barrier(s)? <a href="http://www.cafishpac.org">www.cafishpac.org</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.
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**Purpose:** In compliance with Senate Bill (SB) 857, Caltrans complies with laws and regulations to protect sensitive and listed species by identifying sites that are an impediment to passage and by identifying corrective solutions in project designs. Requirements to address priority fish passage locations will likely change the scope and cost of the proposed projects, in some cases by substantial amounts. Identifying fish passage barrier locations early on will minimize scope change that can delay or cancel a project.

A positive Yes, response indicates the scope of work will include early engagement with the FishPAC and the project may require technical studies with seasonal constraints that will be included in the Risk Register and needs further studies and early engagement with the California Fish Passage Advisory Committee. Further research can be completed on the fish passage website to determine if the project is located within a priority area.

Caltrans coordinates with California Department of Fish and Wildlife (CDFW), National Marine Fisheries Service (NMFS) and other partners to prioritize locations based on biological significance.

**Source:** Please use the following links for more information:

- [California Fish Passage Advisory Committee](#)
- The dataset for Caltrans Fish Passage Priorities can be found at [California Fish Passage Assessment Database](#)

## 7-2 Advance Biological Mitigation Opportunities

7-2 ADVANCE BIOLOGICAL MITIGATION OPPORTUNITIES	Comment/Action
7-2-1 Identify Potential Environmental Mitigation Opportunities for the project: <input type="checkbox"/> Mitigation bank within the project limits with available credits to purchase <input type="checkbox"/> Mitigation Fees from existing Habitat Conservation Plan <input type="checkbox"/> Projects timeline allows participation in the Advance Mitigation Program <input type="checkbox"/> Any opportunities available within the project limits to offset project impacts	Describe.

**Purpose:** "Advance Mitigation" in its broadest sense refers to performing compensatory mitigation in anticipation of and prior to incurring the environmental effects of an action. Specific to Caltrans, this means addressing the potential environmental impacts very early in the planning process, before transportation projects are programmed for delivery. The process involves examining the transportation needs that are identified on various long-range transportation plans, estimating the potential compensatory mitigation needs that may arise from the future transportation projects, and implementing the compensatory mitigation prior to delivery of the transportation projects, such that the needed compensatory mitigation is already available when the projects need it, and that there is no temporal loss of ecological functions or values

Are there any available mitigation banks within the project limits that can offset project impacts? Is there an existing Habitat Conservation Plan? Are there any opportunities available within the project limits to offset project impacts? Are there available mitigation banks with available credits

to purchase? the project will provide mitigation fees? Does the project timeline provide a phasing approach to research and participate in the Advance Mitigation Program? If the project requires mitigation with constraints indicate this action as a risk in the Risk Register. Please note Advance Mitigation and programming funds for mitigation is a complex and multifaced.

**Source:** Please contact the Division of Environmental Analysis Advance Mitigation Program and refer to the following links for more information:

- [CDFW](#) provides a list of entities that are qualified to hold conservation easements and/or manage and steward mitigation land.  
[In-Lieu Fee Programs](#) involve the restoration, establishment, enhancement, and/or preservation of aquatic resources through funds paid to a governmental or non-profit natural resources management entity to satisfy compensatory mitigation requirements for Department of the Army permits. Information on the status of these programs is available in RIBITS.
- [RIBITS](#) (Regulatory In lieu fee and Bank Information Tracking System) was developed by the U.S. Army Corps of Engineers with support from the Environmental Protection Agency, the U.S. Fish and Wildlife Service, the Federal Highway Administration, and NOAA Fisheries to provide better information on mitigation and conservation banking and in-lieu fee programs across the country.

## Section 8: System Planning

The purpose of this section is to identify the State Route designations and Facility Concept early in the planning process. The route designation includes both State and Federal Highway designations. This will help to determine possible restrictions and opportunities in Federal eligibility for funding and other state route improvements or maintenance funding opportunities.

### 8-1 Route Designations

8-1 ROUTE DESIGNATIONS			
8-1-1 Freeway and Expressway	Choose an item.	8-1-8 Scenic Highway	Choose an item.
8-1-2- National Highway System	Choose an item.	8-1-9 National Highway Freight Network	
8-1-3 Federal Functional Classification		8-1-10 Critical Urban Freight Corridor	
8-1-4 Strategic Highway Network	Choose an item.	8-1-11 Critical Rural Freight Corridor	
8-1-5 Strategic Interregional Corridor		8-1-12 NHS and STAA Route Classification	
8-1-6 Interregional Road System	Choose an item.	8-1-13 Truck Network Designation	
8-1-7 Priority Interregional Facility		8-1-14 Other	

#### 8-1-1 Freeway and Expressway

**Purpose:** To identify if a highway is part of the California Freeway and Expressway System. The Freeway and Expressway system encompasses existing and planned access-controlled highways in the United States within California. Highways not identified in the California Freeway and Expressways are considered a Conventional Highway. The Freeway and Expressway designation determines what considerations to think about in potential funding eligibility and existing agreements to maintain and improve the selected project/effort on a highway. This also determines if an existing conventional highway has future provision for access control or restrictions on standards for improvement, or additional right of way needs.

**Source:** Please see the [CA Streets and Highways Code §250-257](#).

#### 8-1-2- National Highway System

**Purpose:** Select Yes or No. Select Yes, if the highway segment is part of the National Highway System. The National Highway System consists of roadways important to the nation's economy, defense, and mobility. Identify if the highway segment or corridor is part of the National Highway

System, which includes the Interstate Highway System and other roads serving major airports, ports, rail or truck terminals, railway stations, pipeline terminals and other strategic transport facilities.

**Source:** [FHWA NHS List](#)

### **8-1-3 Federal Functional Classification**

**Purpose:** Identify the Federal Functional Classification of the segment or corridor. The purpose of this is to provide a framework for identifying the role of a roadway in moving vehicles through a network of highways. Functional classification carries expectations about roadway design, including its speed, capacity and relationship to existing and future land use development. Federal functional classification is used in determining eligibility for funding under the Federal-aid program.

**Source:** [FHWA Federal Functional Classifications](#)

### **8-1-4 Strategic Highway Network**

**Purpose:** Select Yes or No. Select Yes, if the segment is part of the Strategic Highway Network (STRAHNET). The purpose of this is to identify roads that provide “defense access, continuity, and emergency capabilities for movements of personnel and equipment in both peace and war.” STRAHNET includes Routes (for long-distance travel) and Connectors (to connect individual installations to the Routes).

**Source:** Contact the Division of Transportation System Information (TSI), Highway System Engineering Branch or check the link for [National Highway System \(NHS\)](#)

### **8-1-5 Strategic Interregional Corridor**

**Purpose:** Identify if the segment or corridor is part of the Strategic Interregional Corridor. These corridors are typically characterized by high volumes of freight movement and significant recreational tourism. These corridors have been identified as the most significant interregional travel corridors in California. This is used to identify priority for ITIP funding.

**Source:** Please check [Interregional Transportation Strategic Plan](#)

### **8-1-6 Interregional Road System**

**Purpose:** Select Yes or No. Select Yes, if the segment is part of the Interregional Road System (IRRS). IRRS, is a subset of the 265 State Highway System (SHS) routes and provides connectivity between California's major regions. The California State Legislature recognized the importance of interregional travel and the need for the State to target investment in key corridors through the designation of the Interregional Road System (IRRS) – There are currently 93 statutory IRRS routes, with many interstates among them.

**Source:** Please check [Interregional Transportation Strategic Plan](#)

### **8-1-7 Priority Interregional Facility**

**Purpose:** Identify if the segment or Corridor is identified as a Priority Interregional Facility in the latest ITSP. The purpose of this is to identify the facilities most critical in supporting interregional travel. These are highest priority facilities for interregional investment. Also, these facilities are the priority for funding through the ITIP.

**Source:** Please check [Interregional Transportation Strategic Plan](#)

### **8-1-8 Scenic Highway**

**Purpose:** Select Yes, No, or Eligible. Identify if the segment or corridor is officially designated as a State Scenic Highway (select Yes) or eligible for a State Scenic Highway designation (select Eligible) or not in the list (Select No). The State Scenic Highway System in California is a list of

highways, mainly state highways, that have been designated by the California Department of Transportation (Caltrans) as scenic highways. The purpose of this is to establish the State's responsibility for the protection and enhancement of California's natural scenic beauty by identifying those portions of the State highway system which, together with adjacent scenic corridors, require special conservation treatment.

**Source:** [Scenic Highway Program List](#)

### **8-1-9 National Highway Freight Network**

**Purpose:** Identify if the segment or corridor is a part of the National Highway Freight Network (NHFN). Indicate if it is one of the following subsystems of roadways: The Primary Highway Freight System (PHFS), other Interstate portions not on the PHFS, Critical Rural Freight Corridors (CRFCs), and Critical Urban Freight Corridors (CUFCs). The National Highway Freight Network is a network of highways identified as the most critical highway portions of the U.S. freight transportation system determined by measurable and objective national data. This is also used in determining eligibility for Freight related Federal programs and resources.

**Source:** [California Freight Mobility Plan 2020](#)

### **8-1-10 Critical Urban Freight Corridor**

**Purpose:** Select Yes or No. Select Yes if the segment is designated as a Critical Urban Freight Corridors (CUFC). CUFC are public roads in urbanized areas which provide access and connection to the PHFS and the interstate with other ports, public transportation facilities, or other intermodal transportation facilities. States and Metropolitan Planning Agencies (MPOs) are responsible for designating public roads targeted strategically for federal funding through the National Highway Freight Network Program (NHFN). Therefore, this is also used in determining eligibility for Federal funding and resources through the NHFN.

**Source:** [California Freight Mobility Plan \(CFMP\)](#)

### **8-1-11 Critical Rural Freight Corridor**

**Purpose:** Select Yes or No. Select Yes if the segment is designated as a Critical Rural Freight Corridors are public roads not in an urbanized area which provide access and connection to the PHFS and the interstate with other important ports, public transportation facilities, or other intermodal freight facilities. States and Metropolitan Planning Agencies (MPOs) are responsible for designating public roads targeted strategically for federal funding through the National Highway Freight Network Program (NHFN). Therefore, this is also used in determining eligibility for Federal funding and resources through the NHFN.

**Source:** [California Freight Mobility Plan \(CFMP\)](#)

### **8-1-12 NHS and STAA Route Classification**

**Purpose:** Identify the Surface Transportation Assistance Act (STAA) of 1982 Route Classification of the segment or corridor. Indicate if it is a National Network Access or Terminal Access. The STAA route classification allows large trucks to operate on the Interstate and certain primary routes called collectively the National Network. These trucks, referred to as STAA trucks, are longer than California legal trucks. As a result, STAA trucks have a larger turning radius than most local roads can accommodate. Initial identification of Freight truck constraints could help provide addressing Freight alternative strategies and design solutions.

**Source:** Division of Traffic Operations; [Legal Truck Access | Caltrans](#). You may also contact your District Traffic Ops for more information.

### 8-1-13 Truck Network Designation

**Purpose:** Identify the California Truck Network Designation of the segment or corridor. Indicate the following that apply: National Network, Terminal Access, Service Access, CA Legal, CA Legal Advisory, Special Restrictions. The Truck Network Designation is a color-coded "California Truck Network Map", for State highways and is the official government source for truck route information. The Caltrans Truck Network Map provides a District by District overview of the Truck Network STAA Access areas. Initial identification of Freight truck constraints, restrictions, and geometric issues could help provide addressing Freight alternative strategies and design solutions.

**Source:** [Division of Traffic Operations; Truck Network Maps](#) . You may also contact your District Traffic Ops for more information.

### 8-2 Facility Type

8-2 FACILITY TYPE	
8-2-1 Current	
8-2-2 Concept	
8-2-3 Ultimate	

**Purpose:** Identify the Facility Type of the segment or Corridor. The facility type could be a freeway, expressway, conventional, or one-way city street. This can also include bicycle facility, pedestrian facility, transit facility, managed lanes, conversion of existing managed lanes to another managed lane type or characteristic, TMS field elements, Transportation Demand Management and Incident Management.

**8-2-1. Current** – Describe the current facility conditions, the baseline or existing condition. This can include State Highway Facility type, bicycle facility, pedestrian facility, transit facility, managed lanes, conversion of existing managed lanes to another managed lane type or characteristic, TMS field elements, Transportation Demand Management and Incident Management.

**8-2-2 Concept** – Describe the Facility and strategies that may be needed within 20-25 years. This can include capacity increasing, State Highway, bicycle facility, pedestrian facility, transit facility, non-capacity increasing operational improvements, new managed lanes, conversion of existing managed lanes to another managed lane type or characteristic, TMS field elements, Transportation Demand Management and Incident Management. Concepts can include planned and programmed improvements.

**8-2-3 Ultimate** – Describe the full Build-out Concept of the corridor, the final planned improvements to achieve the completeness of the route. This can include capacity increasing, State Highway, bicycle facility, pedestrian facility, transit facility, non-capacity increasing operational improvements, new managed lanes, conversion of existing managed lanes to another managed lane type or characteristic, TMS field elements, Transportation Demand Management and Incident Management. Concepts can include planned and programmed improvements.

**Source:** [District Corridor Plans \(TCR, CSMP, CMCP\), District System Management Plan and other Planning Documents.](#)

## Section 9: Local Development Review

The purpose is to capture readily available land use development activities, projects, plans, and programs that may interfere with the schedule and timing of the identified STIP/SHOPP/FTIP project. This is an opportunity to communicate and coordinate with lead agencies on potential competing projects being constructed within a given area. Collaborative efforts related to project(s) timing and logistical activities requiring a project management plan for immediate area activities.

Provide the below LD-IGR information, as applicable, for current and/or future local development projects that could impact, the proposed Caltrans project. Identify and briefly describe the potential land use development impacts to the Caltrans Project along the segment. Use good judgement to determine local development project(s) impacts, include both on and off the SHS, within an appropriate proximity are relevant to the development of the proposed Caltrans project. CALTRANS PROJECTS CAN BE LOCATED NEAR SEVERAL PROPOSED LOCAL DEVELOPMENT PROJECTS THAT COULD OVERLAP IDENTIFIED SPECIFIC AREAS. List Each Local Development Project that could impact the Caltrans Project.

In general, for each of these fields, if the user does not have the information, in the column state unknown, unavailable or leave blank.

Each project or plan is required by State Statues to make a good faith effort in analyzing for SIGNIFICANT environmental impacts. Local, regional, tribal, and various development projects each year have some degree of impact to the SHS. Caltrans provides recommendations to lead agencies on needed improvements based on the context (i.e., location, size, development category, trip generation, etc.), and how fair share funds can be used for improvements to both the SHS and to local streets and roads.

### 9-1 Local Developments Impacting Project

Local Development-Intergovernmental Review (LD-IGR) program is a mandated ongoing statewide effort focused on avoiding or reducing significant impacts to the State Highway System (SHS) from land use development. The LD-IGR program relies on statutes (codes), regulations, executive orders, policy directives, case laws, technical and professional practice, in a deliberative and public process as the means and basis of reviewing proposed local development projects, general plans and any other governmental actions that may adversely impact the State's transportation system. Caltrans provides transportation expertise shares considerations with lead agencies and assist them throughout their land use planning and decision-making processes. This Program is directed to use 'best practices' analysis methodologies that focus on improving person-capacity of our multi-modal transportation system; efficiently moving goods and services; and accurately describing transportation tradeoffs with other community values.

<b>9-1 LOCAL DEVELOPMENTS IMPACTING PROJECT</b>		<b>Encroachment Required</b> <input type="checkbox"/>	<b>Permit</b>
<b>Project Title:</b> <i>Add Title</i>			
<b>Project Location:</b> <i>Lat/Long or Street address/ County-Route-PM and APN(s)</i>			
<b>GTS link:</b> <i>Add Link</i>			

Map or identify the project's location in Latitude and Longitude, County-Route-Postmile, and/or street address.

<b>9-1-1 Project Description:</b>		
<b>9-1-2 Distance to Caltrans Project:</b>		
<b>9-1-3 Summary of Mitigation Measures:</b>		
<b>9-1-4 Mitigation Funding Source(s)</b>	<b>9-1-5 Amount of Available Funding</b>	<b>9-1-6 Summary of Caltrans Concerns:</b>

**9-1-1 Project Title and Description:** Identify Activity, Project, Plan, and/or Program with a brief Title and Description. Depending on the proximity of the lead agency's project, which may interfere with logistics, the schedule, and construction timing of the identified STIP/SHOPP/FTIP project.

**9-1-2 Distance to Caltrans Project:** Based on the context (i.e., location, size, development category, trip generation, etc.) of the lead agency's project, the local development could pose a direct impact to the STIP/SHOPP/FTIP project, which could lead to project delays.

**9-1-3 Summary of Mitigation Measures:** are opportunities to make recommendations based on potential impacts identified based on the context. Communication with the lead agency can lead to collaborative and coordinated efforts to make essential improvements which are in the community's best interest for completion of projects.

**9-1-4 Mitigation Funding Source(s):** If applicable, identify funding sources for proposed mitigation measures and/or improvements. These funds can be based on a developer's fair share of development fees, local or state funds based on the necessary improvements.

**9-1-5 Amount of Available Funding:** If applicable, identify the funding amount and source from which the funds come.

**9-1-6 Summary of Caltrans Concerns:** Identify and summarize Caltrans concerns based on potential land use development impacts to the STIP/SHOPP/FTIP Project along the segment. Based on research and collected data use good judgement to determine the extent of the local development project(s) impacts to the SHS, given the proximity to the proposed STIP/SHOPP/FTIP project

**Source:** For more LD-IGR Information document, guidance, and LD-IGR statewide contact information, review the following:

- Local Development - Intergovernmental Review
- [Geobased Tracking System \(GTS\)](#) / This requires an account that is provided from your District LD-IGR Coordinator.
- LD-IGR Program Contact List for every District and HQs [Download PDF at bottom of LD-IGR Home webpage]

## Section 10: Broadband Coordination

### 10-1 Broadband Opportunities

10-1 BROADBAND OPPORTUNITIES ( <a href="#">CPUC Map</a> , <a href="#">BMMN Map</a> , <a href="#">Caltrans-owned Broadband Map</a> )	
10-1-1 Is there existing broadband infrastructure (fiber optic cable) available for Caltrans use within the project location?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown (Defer to PID)
10-1-2 If 'Yes', who owns the broadband infrastructure?	<input type="checkbox"/> Caltrans <input type="checkbox"/> BMMN <input type="checkbox"/> ISP <input type="checkbox"/> Other
10-1-3 If 'No', is there an opportunity for Caltrans to install broadband infrastructure as part of this project?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown (Defer to PID)

**Purpose:** Broadband is critical for Caltrans as we deploy more ITS technologies / TMS infrastructure within our highway right of way. For example, we are currently deploying CCTV cameras that have computer vision/Artificial Intelligence that helps us with census and traffic management. These and other TMS elements need high speed and reliable communication systems to share large amounts of data quickly with the Traffic Management Center. In the near future we will be using broadband for connected and automated vehicles, where there will be a need for high-speed communication between vehicles and infrastructure. Our goal is to make sure we have broadband along every foot of our highways. With this background, please determine the need for including broadband infrastructure in the project.

**Source:** Use the following three maps to answer the questions above:

1. CPUC's map showing private ISPs: <https://www.broadbandmap.ca.gov/>
2. Map showing the proposed BMMN along with Caltrans PIDs and projects under development. Use the layer called "identified middle mile" which describes Segments of the SHS identified as middle mile projects and "No Regrets" counties by CPUC: <https://sv03tmcpo.ct.dot.ca.gov/portal/apps/webappviewer/index.html?id=1476e94a2165401d916ba5bf911d2df8>

- Map showing Caltrans owned Broadband. Use the three layers (Exist, Program, Proposed) under "Fiber Optic Inventory":  
<https://sv03tmcpo.ct.dot.ca.gov/portal/apps/webappviewer/index.html?id=7709b9ab85484fa9bcd181f77936af02>

More information, including district point of contacts, are available at:

- BMMN Contacts: <https://design.onramp.dot.ca.gov/broadband-middle-mile-network-bmmn-program>
- District Broadband Contacts: <https://dot.ca.gov/programs/design/wired-broadband/poc>
- Encroachment Permit Contacts: <https://dot.ca.gov/programs/traffic-operations/ep>

## Section 11: Freight Considerations

### 11-1 Freight Opportunities and Considerations

11-1 FREIGHT OPPORTUNITIES AND CONSIDERATIONS		
11-1-1 Are there any known unauthorized truck parking issues or deficiencies along the route?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.

**Purpose:** Currently, California is number 48<sup>th</sup> in the nation for adequate truck parking (spaces per truck VMT). Frequently, truckers do not have safe places to park, which results in non-compliance with federal, mandated Hours of Service reporting, increased emissions from driving around for a spot to park and increases the chances of unauthorized parking resulting in traffic tickets, unsafe conditions for the truckers, and potentially unsafe conditions for the traveling public. Caltrans may want to consider adding additional truck parking spaces or areas for drivers, or improve areas where drivers are already parking.

A "YES" or "NO" answer should result from the quantification of authorized truck parking lots, both publicly and privately owned. If "YES", then note the distance between parking (e.g. 52 miles) and engage city/county and private stakeholders to engage in early conversation about providing truck parking.

**Source:** The CA Statewide Truck Parking Study will have this information, at the earliest, by March 2021.

11-1-2 Are there any existing or planned restrictions/limitations pertaining to truck weight or height?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.
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**Purpose:** Planners should identify limitations of the transportation network when accommodating freight traffic. Frequently, these trucks carry tens of thousands of pounds, and the weight or height of the trucks may not be allowed on certain roads, bridges, or underpasses. This can result in lengthy detours and added costs to the industry.

If "YES", then identify alternate routes trucks could take (such as a frontage road or adjacent freeway) or list the truck limitations by postmile. The project may be able to incorporate components to eliminate or reduce restrictions/limitations.

**Source:** Refer to Traffic Operations staff to ensure the most up to date data.

<b>11-1-3 Identify truck usage impacts within the project area:</b> <input type="checkbox"/> Truck Bottleneck/Congestion <input type="checkbox"/> Distressed Pavement <input type="checkbox"/> Truck Geometric Constraints (Truck/Weight/Height restrictions)	<input type="checkbox"/> Shoulder Width <input type="checkbox"/> Shoulder Dust Issues <input type="checkbox"/> Bridge Conditions	Add text if needed.
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**Purpose:** California's economy relies on the consistent and timely shipment of goods to stores, warehousing, distribution centers, and for import/export. The truck usage impact list hampers

shippers' and receivers' abilities to deliver goods on time, often spending more money in fueling, maintenance, and wages. A recommendation would be to list any other alternative freight modes, such as a railroad service that could take freight away from the roads and alleviate congestion, or to make deliveries/shipments in off-peak hours.

**Truck Bottleneck/Congestion** means that there may be extreme congestion due to the proximity of trucking usages (such as distribution center, port, airport, etc) and the large amount of trucks getting on/off the freeway degrades the traffic flow. A recommendation could be for the project to develop bottleneck relief components, find alternate routes, or work with local agencies to stagger shipping and receiving times to off-peak hours.

**Distressed pavement** means that the pavement conditions are poor, resulting in more wear and tear and maintenance costs for trucks, as well as reduced fuel efficiency. A consideration could be made to improve pavement conditions as part of the project to avoid even more costly future maintenance.

**Truck Geometric Constraints** means that an intersection or turn-off is not wide enough to accommodate the large turn radius of a truck. An example would be pedestrian improvements, such as a bulb-out at a curb, which reduces the amount of available surface street area for a truck to turn. A recommendation would be to find appropriate solutions to the context that properly balances corridor needs.

**Shoulder width** would mean a small shoulder that is too small to accommodate a truck, should a driver need to make an emergency stop on a freeway. The small shoulder would cause the truck to encroach on the driving lane, thus making a dangerous situation for both the truck and traveling public. On a conventional highway, a small shoulder may be constantly getting damaged or impact the integrity of the travel lanes.

**Shoulder Dust Issues** refer to an unpaved or partially unpaved shoulder. When a truck stops on the shoulder, and then begins to drive again, the amount of dust in from the tires against the dirt creates a plume of dust, which can impede sight for both the trucker and traveling public. Shoulder dust may also reduce air quality, especially for those nearest the travelled way. Considerations should be given to improve shoulder conditions appropriate to the context.

**Bridge Conditions** refer to a bridge that may be substandard in terms of good repair, weight limitations, or height. This could cause a truck to get stuck in the underpass, collapse the bridge if crossed, or put excess strain on the bridge that should not support heavy loads.

**Source:** Please refer to the following links for more information:

- [Bottlenecks](#)
- [State Highway Bridges](#)
- [Local Bridges](#)

<p><b>11-1-4 Check if apply:</b></p> <p><input type="checkbox"/> The project area contains intermodal connections to other freight facilities (sea ports, rail, airport)</p> <p><input type="checkbox"/> Freight key services along route (e.g. agriculture (crops, processing, packing))</p>	<p>Add text if needed.</p>
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**Purpose:** Planners may want to consider the special needs of an intermodal facility such as a seaport, railyard, or airport. There may be specialized commercial vehicles that use the highway or heavier truck volumes near these facilities that should be considered when developing projects.

Key freight services mean warehousing, distribution centers, packing facilities, agricultural lands, etc. Being aware of key freight services is important because there may be special needs for these facilities such as clear sight distance, truck acceleration lanes, pavement considerations, or geometric considerations. Goods from these freight facilities rely on the proximity of the highway system and its reliability to always be available and safe.

**Source:** Please refer to the following links for more information:

- [Ports of Entry-](#)
- [Freight Intermodal Facilities](#)

11-1-5 Are there any opportunities for Truck Parking, based on SRRAs or any relevant truck parking studies?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.
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**Purpose:** California has a shortage of truck parking supply and truck parking is a major complication for the freight industry. If there are any opportunities for expansion or implementation of truck parking facilities within a project scope, please note them here.

By choosing a “YES”, please list the SRRAs or other location where truck parking has been indicated. If “NO”, please briefly describe (if there were deficiencies described above) where alternatives for truck parking may be located within the region if not able to be accommodated in this project.

**Source:** Please refer to the following links for more information:

- [Final SRRAs Master Plan Report](#)

11-1-6 Identify opportunities for zero emission fueling (electric charging, hydrogen) for vehicles including trucks.	<input type="checkbox"/> Yes <input type="checkbox"/> No	Describe.
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**Purpose:** With Executive Order N-79-20 and other climate change related legislation and goals, there is increased need to expand available places to fuel zero emission vehicles. There may be plans to accommodate at SRRAs or at Caltrans facilities, or there may be plans to expand at private facilities along the traveled way. This may require special considerations such as site entry design and signage.

**Source:** Please refer to the District zero emission vehicles coordinator or district freight liaison for more information. The [SRRAs Master Plan](#) or Statewide Truck Parking Study may have additional information