

BICYCLE TRANSPORTATION PLAN AND BICYCLE TRANSPORTATION ACCOUNT PROCEDURES

BICYCLE TRANSPORTATION PLAN (BTP) PROCESS

Responsible Unit	Action
DISTRICT	1. Following receipt of BTA application solicitation package from Bicycle Facilities Unit (BFU) (See step 3 in BTA Process), notifies city and county agencies of the deadline for submittal of BTA applications and Bicycle Transportation Plans (BTPs) needing BFU approval.
LOCAL AGENCY	2. Prepares BTP. 3. The governing body of the city or county adopts BTP by resolution. 4. Submits BTP to appropriate Metropolitan Planning Organization (MPO) or Regional Transportation Planning Agency (RTPA) for review and approval that it complies with Streets and Highways Code Section 891.2 and the regional transportation plan (RTP). 5. Submits BTP, adopting resolution, and MPO/RTPA letter of approval to BFU by BTA application deadline.
BFU	6. Reviews BTP and approves or disapproves per Streets and Highways Code Section 891.2 (See Exhibit 21-D "Bicycle Transportation Plan Checklist"). 7. Logs BTP, adopting resolution, and MPO/RTPA approval letter in BTP database. 8. Notifies local agencies of the results of plan review.

BICYCLE TRANSPORTATION ACCOUNT (BTA) PROCESS

Responsible Unit	Action
BFU	1. Determines amount of BTA funds available for programming. 2. Develops annual BTA application solicitation package and forwards package to districts typically by late summer/early fall.
DISTRICT	3. Sends BTA application solicitation package to cities and counties.

Bicycle Transportation Plan and Bicycle Transportation Account Procedures

- LOCAL AGENCY 4. Completes BTA application and sends signed original and one copy to the District Local Assistance Engineer (DLAE) typically by the first working day of December. The Department encourages applicants to contact the DLAE to ensure that all submitted BTA applications and information have been received.
- DISTRICT 5. Ensures application completeness, evaluates BTA applications according to evaluation criteria in Exhibit 21-C, "District Bicycle Transportation Account Evaluation Form" and forwards signed original application and Exhibit 21-C to BFU typically by the first working day in January. DLAE retains one copy of the application and Exhibit 21-C for district file.
- BFU 6. Reviews all submittals to determine applicant eligibility and application completeness, logs into database. BFU staff may contact an applicant or DLAE for information needed to make an eligibility determination. If an applicant is determined to be ineligible or the application is incomplete, the application will be rejected without evaluation.
- BFU EVALUATION COMMITTEE 7. Reviews all eligible and complete applications under a competitive process for bicycle commuter value and compliance with the California Bicycle Transportation Act. Forwards evaluations and a list of projects recommended for funding to Department management for review.
- DEPARTMENT MANAGEMENT 8. Reviews the application evaluations and the list of projects recommended for funding and develops an approved list of projects to be funded.
- BFU 9. Provides results of selection process on the Division of Local Assistance website at:
<http://www.dot.ca.gov/hq/LocalPrograms/bta/btaweb%20page.htm>.
Assigns BTA identification numbers to selected projects.
10. Develops Local Agency-State Agreement for each selected project. The Local Agency-State Agreement addresses project scope, schedule, cost, and reimbursement ratio.
- ACCOUNTING 11. Certifies availability of BTA funds.
- BFU 12. Signs agreements and sends to local agencies for signature.
- LOCAL AGENCY 13. Signs agreement(s), develops any required resolutions, and sends original executed agreement(s) and resolutions to BFU. Begins work on the projects after execution of the agreement(s). Construction may be performed by contract or local agency in accordance with the laws applicable to the local agency.

- BFU 14. Retains a copy of executed agreements in BTA files and forwards originals to Accounting and a copy to the DLAE
- ACCOUNTING 15. Provides original executed agreements to Office of State Controller.
- LOCAL AGENCY 16. Develops plans, specifications and estimates, and certifies that project complies with standards in the *Highway Design Manual, Chapter 1000*. Sends copy to BFU and DLAE if requested.
17. Submits progress pay invoices with itemized expenditures to BFU (step 20). Progress pay invoices are subject to DLAE inspection and approval upon BFU request. Submits final invoice with itemized expenditures to DLAE (step 18) by April 1st of the year that the funds are scheduled to lapse. Invoices must be original, signed by the responsible person in the local agency, submitted on local agency letterhead with local agency's address, current date, and DLAE signature block addressed to the California Department of Transportation.
- DISTRICT 18. Inspects project for completion and conformance with the approved Local Agency-State Agreement and, if applicable, Chapter 1000 of the Highway Design Manual.
19. Accepts project, validates invoice with signature block or stamp, and submits to BFU recommending payment of funds to local agency,
- OR
- Rejects the project and notifies local agency. Coordinates final project inspection with local agency until project is accepted and notifies BFU.
- BFU 20. Reviews and approves submitted invoice and forwards it to Accounting with request for payment to local agency.
- ACCOUNTING 21. Requests payment to local agency from the Office of State Controller.
- CONTROLLER 22. Pays local agency.

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