

**Measure B Bicycle and Pedestrian Countywide Discretionary Fund Grant Program  
Cycle 4 - 2008/2009**

**APPLICATION GUIDANCE**

This document provides information on Cycle 4 of the Measure B Bicycle and Pedestrian Countywide Discretionary Fund Grant Program and summarizes how to complete and submit an application. **Applications are due to ACTIA by 3:00 p.m. on Wednesday, December 17.**

The Measure B Bicycle and Pedestrian Countywide Discretionary Fund is a competitive grant program, one of several programs funded out of the 5 percent of Measure B funds dedicated to bicycle and pedestrian programs. The grant fund goal is to expand and enhance bicycle and pedestrian access, convenience, safety, and usage in Alameda County, focusing on projects and programs with countywide significance. This program will equally fund bicycle and pedestrian projects over the lifetime of the Measure. This is the Program's fourth funding cycle.

**HOW DO I FIND OUT MORE INFORMATION ABOUT APPLYING FOR FUNDING?**

Start by reviewing this Application Guidance document and the Program Guidelines before completing the application. You can find the Program Guidelines, the application form, and many additional resources, at the ACTIA Web site: [www.actia2022.com](http://www.actia2022.com).

If you have further questions, please contact:

Rochelle Wheeler, Countywide Bicycle and Pedestrian Coordinator  
Alameda County Transportation Improvement Authority  
1333 Broadway, Suite 300  
Oakland, CA 94612

Phone: (510) 267-6121

Email: [rwheeler@actia2022.com](mailto:rwheeler@actia2022.com)

**WHO MAY APPLY?**

- Any public agency that operates within Alameda County may apply for funding.
- Nonprofit organizations that meet ACTIA's adopted nonprofit organizational requirements, listed below, may apply for funding. The nonprofit must:
  - Document itself as a formally recognized IRS organization for a minimum of three years.
  - Engage independent auditors and receive an unqualified opinion on annual financial statements.
  - Have a governance structure that independently oversees management of the nonprofit.
  - Be able to provide adequate insurance to cover project/program/service activities, list ACTIA as an additional insured, and indemnify ACTIA.
- Private companies may join with a public agency to sponsor and implement a project, but the public agency must be the applicant and the project lead.

### WHAT TYPES OF PROJECTS AND PROGRAMS ARE ELIGIBLE FOR FUNDING?

The following list includes **some** of the major eligible project/program types. For more detail on all eligible and ineligible projects/programs, consult the Program Guidelines or contact ACTIA's Bicycle and Pedestrian Coordinator.

- Pedestrian and/or bicycle capital projects (all phases). This includes new bikeways, crossing improvements, upgrades of existing facilities, and bicycle/pedestrian access improvements to transit.
- Bicycle parking facilities and bicycle racks on buses.
- Feasibility studies for bicycle/pedestrian projects.
- Maintenance of Class I bikeways and bicycle-transit facilities on a case-by-case basis (see definition of "routine maintenance" below).
- Bicycle and/or pedestrian master plans (and plan updates).
- Bicycle and/or pedestrian promotion and education programs.

All projects and programs must be located in Alameda County. If a project/program extends beyond the limits of Alameda County, your organization will need to use other funds to implement that portion of the project/program.

Ineligible Projects/Programs include:

- Routine maintenance (Definition: Roadway maintenance activities are considered routine maintenance and are therefore ineligible. However, ACTIA will consider on a case-by-case basis, maintenance of multi-use trails and bicycle-transit facilities that serve a large number of pedestrians and/or bicyclists, have countywide significance, and will significantly improve the safety and convenience of the facility.)
- Ongoing facility operations (e.g. attended bicycle parking)
- Funding to replace funds for existing ongoing programs

### WHAT ARE THE BASIC ELIGIBILITY POLICIES?

All projects must have countywide significance to be eligible for funding. In general, projects must serve residents from more than one specific area or jurisdiction in Alameda County. Specifically, "countywide significance" is defined in the following ways:

*Capital Projects:*

- Bicycle projects must be identified as a High Priority Project or meet the definition of a Transit-Priority Zone project in the Alameda Countywide Bicycle Plan (ACBP), or must be a feasibility study for a project identified on the Financially Constrained Network in the ACBP.
- Pedestrian projects must be identified in the Countywide Strategic Pedestrian Plan as having countywide significance.
- Combined bicycle/pedestrian projects must meet at least one of the above two criteria.

*Local Bicycle and/or Pedestrian Master Plans:*

- All local master plans are considered to have countywide significance since they will enhance the ability of the county to identify and implement the highest priority bicycle and/or pedestrian improvements.

*Programs:*

- Programs must fall within the categories listed in the Countywide Bicycle Plan or Countywide Strategic Pedestrian Plan, AND
- Programs must be targeted to the entire county, or they must be a demonstration, pilot or innovative program that could be applied at other agencies/jurisdictions, or that produce a resource easily used by other agencies or throughout the county.

Additionally, to be eligible for funding, the project or program must be viable. Refer to Program Guidelines for viability requirements.

**HOW MUCH MONEY IS AVAILABLE IN THIS FUNDING CYCLE, AND WHAT IS THE MAXIMUM AND MINIMUM AWARD?**

A total of \$4 million is available in this funding cycle. The minimum grant award amount is \$20,000, and the maximum grant award amount is \$1 million. ACTIA will distribute funds equitably between bicycle and pedestrian projects.

**IS A LOCAL MATCH REQUIRED?**

No local match is required, except for feasibility study projects; however, projects with matching funds will receive a higher ranking in the evaluation process. Feasibility study projects require a 50 percent match. In-kind funding is not included in the matching funds calculation for any project type.

**HOW MANY APPLICATIONS MAY BE SUBMITTED?**

An agency or organization may submit no more than three applications for Measure B funds.

**IS A RESOLUTION REQUIRED?**

You do not need to submit a resolution with the application. If a project is selected for funding, you will be required to submit an authorizing resolution **by June 1, 2009**. A resolution template will be available on the ACTIA Web site.

**WHEN WILL THE FUNDS BE AVAILABLE TO EXPEND?**

The funds will be available as of July 1, 2009 (the start of the 2009/2010 fiscal year).

### **WHAT IS THE DEADLINE FOR EXPENDING FUNDS?**

The project must be completed, and all funds must be expended, within 2 years of the grant initiation date (July 1, 2009). Therefore, the expenditure deadline is June 30, 2011. ACTIA may approve a longer period for project completion, if requested in writing in advance.

The project must be initiated within a year of the grant initiation date. ACTIA may rescind grant funds if a project is not initiated within the first year.

### **HOW ARE FUNDS DISTRIBUTED?**

ACTIA distributes funds on a reimbursement basis after receiving requests for reimbursement from the grant recipients.

- Projects approved for Measure B funds require a Funding Agreement with ACTIA. A draft Funding Agreement template is available on the ACTIA Web site.
- ACTIA will not make reimbursements prior to executing the Funding Agreement.
- ACTIA does not reimburse indirect costs (i.e., overhead) with these funds.
- Failure to meet timely use of funds requirements, meet the project schedule without a compelling reason, file required monitoring reports, or comply with applicable regulations could result in loss or withholding of funding.
- Project Sponsors must submit progress reports and invoices for reimbursement at least once every 6 months.

### **WHAT ARE THE MONITORING REQUIREMENTS?**

Progress reports are required every 6 months to illustrate project progress. A copy of the reports for another funding agency may be submitted, with prior approval. A final report, once the project is complete, is required. For capital projects, the collection of pre-and post-project usage data is required, and is a reimbursable expense. Additional monitoring requirements are listed in the Program Guidelines.

### **WHERE DO THESE FUNDS COME FROM?**

Measure B, approved by Alameda County voters in 2000, is a half-cent transportation sales tax that finances a multitude of projects and programs to improve the County's transportation system. Collections began in April 2002 and will continue through March 2022. Of the net revenue collected, 5 percent is dedicated to bicycle and pedestrian projects. These funds are broken into two funding components:

- 75 percent of the funds are local "pass-through" funds distributed to Alameda County cities and the County based on population.
- 25 percent of the funds are for countywide planning and projects, including this grant program.

**WILL FUNDING BE AVAILABLE IN THE FUTURE?**

The Measure B Countywide Discretionary Fund grant cycle occurs every other year. The next anticipated programming cycle will occur in 2010/2011.

**IS THIS FUNDING CYCLE BEING COORDINATED WITH OTHER GRANT FUND PROGRAMS?**

No. Unlike in previous cycles, this Measure B funding cycle is not being coordinated with other grant programs. There are no other countywide bicycle/pedestrian funding sources with similar schedules with which to coordinate at this time. As feasible, ACTIA will coordinate future Measure B grant funding cycles with other bicycle/pedestrian funding programs.

**HOW WILL THE APPLICATIONS BE EVALUATED?**

ACTIA staff and the ACTIA Bicycle and Pedestrian Advisory Committee (BPAC) will evaluate and score the applications. They will score capital projects, local master plans, and programs separately, ranking projects against those in the same categories.

ACTIA and BPAC will use a variety of criteria to evaluate the applications, as outlined in the Program Guidelines and detailed in the Scoring Guidance (available on the ACTIA Web site). Please review these two documents for a list of *all* evaluation criteria. While the criteria differ for capital projects, local master plans and programs, the following criteria are common to all:

- Countywide priority
- Outside funding
- Project readiness
- Local support

Additional evaluation criteria for both capital projects and programs include the following:

- Safety
- Demand
- At risk/under-served communities
- Multi-modal benefit

Additional evaluation criteria for capital projects include the following:

- Gap closure
- Access to areas of countywide significance
- East Bay Regional Park District project/facility

The evaluation criteria alone do not determine which projects are funded. As outlined in the Program Guidelines, the ACTIA BPAC will apply equity criteria to determine the final list of recommended projects. Equity criteria include:

- *Modal Equity* – Roughly equal funding for bicycle and pedestrian projects over the lifetime of the grant program. In a single cycle, neither mode should receive more than 65 percent of the total funding.

- *Geographic Equity* – Equitable distribution of funds throughout the County over the life of the grant program.
- *Balance of Project Types* – Funding for a variety of project types, not solely construction projects.

### HOW DO I COMPLETE THE APPLICATION FORM?

First, download the application form from the Web and save it to your computer. The application is an Excel workbook with 12 sections in 18 worksheets (tabs). The worksheet tabs run along the bottom of the file. Click on these tabs to navigate through the sections of the application. Each worksheet has been formatted (protected) so that only the yellow shaded input cells can be selected. Within each worksheet, use the tab key to navigate from cell to cell.

The following is a listing of the sections of the application and the project types they are required for:

- Section 1: General Project Information. To be completed for all projects.
- Section 2: Project Sponsor Information. To be completed for all projects.
- Section 3: Project Description. To be completed for all projects.
- Section 4: Project Costs. To be completed for all projects.
- Section 5: Project Funding. To be completed for all projects.
- Section 6: Project Milestones. To be completed for all projects.
- Section 7: Public Support. To be completed for all projects.
- Section 8: Capital Projects (all phases):
  - Part A: Project Info
  - Part B: Specific Project Info/Type
  - Part C: Project Evaluation
  - Part D: Project Readiness
  - Part E: Countywide Plans

All parts of Section 8 are to be completed for all bicycle and/or pedestrian capital (construction) projects, including feasibility and planning studies.

- Section 9: Master Plans. To be completed for all bicycle and/or pedestrian master plan projects.
- Section 10: Bicycle or Pedestrian Programs. To be completed for all bicycle and/or pedestrian programs.
- Section 11: Additional Project Information. To be completed only as needed.
- Section 12: Application Attachments. The attachment checklist is to be completed for all projects.

## HOW DO I SUBMIT AN APPLICATION?

**The applications are due by Wednesday, December 17, 2008 at 3:00 p.m. ACTIA will not accept faxed or late applications.**

Please submit **4 (four)** complete hard copies of the application ***and*** 1 electronic version.

**Hard copies:** Each printed application must be loose leaf (not bound) and easily reproducible and readable in black and white (this includes maps).

**Electronic Version:** Submit an electronic version of the Excel application file and any required attachments. Clearly name all electronic files by including the program (“CDF4”), sponsor name, and project in the title:

*Example: “CDF4\_Albany\_BuchananPath”*

Submit maps and other attachments (Plan excerpts, etc.) as doc, xls, pdf or jpg files.

Hand-deliver or mail hard copies of your application to:

Alameda County Transportation Improvement Authority  
Attn: Rochelle Wheeler, Countywide Bicycle and Pedestrian Coordinator  
1333 Broadway, Suite 300  
Oakland, CA 94612

Email the electronic version to: [smcmillian@actia2022.com](mailto:smcmillian@actia2022.com)

## WHAT IS THE SCHEDULE FOR THIS FUNDING CYCLE?

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|---------------------------|---|
| October 30, 2008:         | Release Call for Projects                 |
| November 13, 2008:        | Application Workshop at ACTIA             |
| <b>December 17, 2008:</b> | <b>Applications Due at 3:00 p.m.</b>      |
| March 2009:               | BPAC recommendation to Board              |
| April 2009:               | Final program to ACTIA Board for approval |
| June 1, 2009:             | Resolutions due for approved projects     |
| July 1, 2009:             | Funds available                           |