

Complete Streets Checklist User Guide

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Background/Purpose

In March 2022, MTC adopted [Resolution 4493](#) updating the Bay Area’s regional Complete Streets (CS) Policy, first adopted in 2006. The goal of MTC’s Complete Streets Policy is to ensure people biking, walking, rolling, and taking transit are safely accommodated within the transportation network. This policy works to advance Plan Bay Area 2050+ objectives of achieving mode shift, safety, equity, and vehicle miles traveled and greenhouse gas emission reductions, as well as state and local

compliance with applicable CS-related laws, policies, and standards, specifically the California Complete Street Act of 2008 (Gov. Code Sections 65040.2 and 65302) and locally-adopted CS resolutions.

Definitions

Complete Streets

Complete Streets are planned, designed, constructed, reconstructed, operated, and maintained to be safe and comfortable for everyone, regardless of age, ability, ethnicity, race, sex, income, disability or chosen transportation mode. Complete Streets provide safe mobility and improved connectivity to community destinations for all users, and especially for people walking, rolling, biking, and riding transit, while maximizing the use of the existing public right-of-way by prioritizing space-efficient forms of mobility (walking, cycling, shared mobility, and public transit) over space-intensive modes (single occupancy auto travel).

Right-of-Way

Public Right-of-Way, for complete streets policy purposes, is any land owned or controlled by a governmental entity, dedicated for public use such as streets, highways, freeways, sidewalks, and other roadways.

Project Sponsor

The Project Sponsor is the public agency leading and primarily responsible for delivering the proposed project and fulfilling the Complete Streets Policy requirements.

Plan Bay Area 2050+

Plan Bay Area 2050+ is the latest long-range plan to guide growth and investment across the region's nine counties and 101 cities. The plan seeks to advance an integrated vision for a Bay Area that is affordable, connected, diverse, healthy and vibrant for all. Plan Bay Area 2050+ Strategy T9 calls for enhanced streets, paths, and trails to promote walking, biking, and rolling through sidewalk improvements, car-free slow streets, and All Ages and Abilities Active Transportation Network. MTC's Active Transportation Plan (AT Plan) defines a regional Active Transportation Network (AT Network), made up of regionally significant segments of local active transportation

networks and regional trails, based on traffic safety, user comfort, equity, and connectivity to transit.

Policy

All projects subject to MTC's CS Policy shall adhere to two main requirements:

1. All projects must implement CS as recommended in adopted local and countywide plans, such as bicycle, pedestrian, active transportation, Vision Zero or other systemic safety plan, transit plans, and MTC-funded Community-Based Transportation Plans.
2. Projects on the AT Network shall incorporate design principles based on designing for "All Ages and Abilities," [contextual guidance](#) provided by the National Association of City Transportation Officials (NACTO), and consistent with state and national best practices. A facility that serves "all ages and abilities" is one that effectively serves the mobility needs of children, older adults, and people with disabilities and in doing so, works well for everyone else. Design best practices for safe street crossings, pedestrian, and Americans with Disabilities (ADA) accessibility at transit tops, and bicycle/micromobility facilities on the AT Network should be incorporated throughout the entire project. [The Public Rights-of-Way Accessibility Guidelines \(PROWAG\)](#) by the U.S. Access Board should also be referenced during design.

Applicability

How to Determine if a Project is Subject to the MTC Complete Streets Policy and Required to Submit a Complete Streets Checklist.

A project is subject to the MTC Complete Streets Policy and must submit a Complete Streets Checklist if they respond **YES** to all of the conditions below:

- ✓ Project is within the public right-of-way; **AND**
- ✓ Project is requesting \$250,000 or more in regional discretionary funding (e.g., OBAG, RM3, TDA3, etc.); **AND**
- ✓ Project is requesting funding from MTC **OR** MTC endorsement for a grant managed by another agency (e.g., FHWA, Caltrans, etc.).

Projects that meet some of the above conditions, but not all, are not subject to MTC's Complete Streets Policy, and therefore are not required to fill out or submit a Complete Streets Checklist.

Examples of Projects Not Subject to Complete Streets Policy & Not Required to Submit a Checklist:

- Project funding request for regional discretionary funding is less than \$250,000; or
- Project is not requesting regional discretionary funding from MTC; or
- Project is not requesting MTC endorsement; or
- Project is not within the public right-of-way; or
- Bus Purchases (or other equipment purchases); or
- Project is for education and outreach only; or
- Dredging or dock construction (for ferry or other water transportation needs).

Complete Streets Policy Exceptions

The CS policy shall apply to all phases of project development except under one or more of these four exception conditions:

1. The affected roadway is legally prohibited for use by bicyclists and/or pedestrians.
2. The costs of providing Complete Streets improvements are excessively disproportionate to the need or probable use (defined as more than 20 percent for Complete Streets elements of the total project cost).
3. There is a documented alternative plan to implement Complete Streets and/or on a nearby parallel route.
4. Conditions exist in which Complete Streets policy requirements cannot be met, such as fire and safety specifications, spatial conflicts on the roadway with transit, or environmental concerns such as abutting conservation land or severe topological constraints.

To claim an exception under one of more of these conditions, the project sponsor shall follow the procedures below and provide the required documents indicated:

1. Fill out a draft Complete Streets Checklist responding to all applicable questions utilizing the MTC Complete Streets Portal and download a copy of the checklist.
2. The project sponsor must provide documentation in the Complete Streets Checklist detailing how the project meets one or more of the exception conditions above. Documentation for claiming exception should be in the form of a letter or email and must be signed by the agency's Public Works Director, Transportation Department Director (or equivalent), or their designee, and not the Project Manager. The signed documentation for the exception(s) should be uploaded utilizing the document upload function in the Exceptions section of the checklist form on the MTC Complete Streets Portal.
3. Schedule a review of the Complete Streets Checklist, including the claim for policy exception, by the local or county BPAC.

4. Once BPAC review of the Complete Streets Checklist has been completed, utilize the MTC Complete Streets Portal to update the project's checklist to include a summary of the BPAC notes under the appropriate question.
5. Submit the fully completed, final Complete Streets Checklist for the project using the MTC Complete Streets Portal.

Transit Priority Policy Exceptions

Please follow the guidance from the Regional Network Management (RNM) team at MTC. <https://mtc.ca.gov/operations/transit-regional-network-management/transit-priority/transit-priority-policy-roadways>

Checklist Submittal Process

Recommended Timeline

At project initiation:

- Begin coordination with any transit agencies with transit stops and/or transit lines within the project area.
- Document the coordination in writing along with any comments from the applicable transit agencies for use in the required checklist submittals.

4 months prior to submittal of request to MTC for regional discretionary funding or a letter of support:

- Use the MTC Complete Streets Portal to create and download a draft checklist for use in BPAC review.
- Schedule BPAC review of the draft checklist.

3 months prior to submittal of request to MTC for regional discretionary funding or a letter of support:

- Complete BPAC review of the checklist.
- Utilizing the MTC Complete Streets Portal, update the draft checklist based on the BPAC review including adding a summary of the notes from the BPAC review.
- Submit the updated final checklist via the [MTC Complete Streets Portal](#).

Within 3 weeks after project sponsor submits the final checklist to MTC:

- MTC reviews checklist and issues a determination. (Please check the Portal periodically for updates on determinations)

Determinations

The following is a list of the possible determinations and follow-up processes (if any) resulting from the checklist reviews:

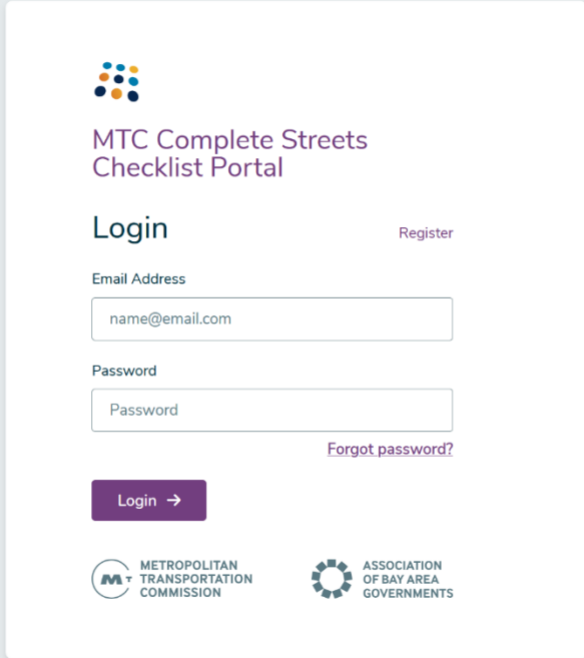
- **Project Compliant:** The project is determined to be compliant, and no further documentation or review is necessary to move forward with the funding request or letter of support.
- **Exception Verified:** The exception requested under the checklist is verified, and no further documentation or review is necessary to move forward with the funding request or letter of support.
- **Incomplete:** The checklist is determined to be incomplete, and additional documentation and/or information will be required to be submitted. The most common reasons for an “Incomplete” determination are:
 - Missing BPAC Documentation – Upload summary of BPAC comments from the Complete Streets Checklist review.
 - Missing Transit Agency Review Documentation – Upload documentation required by TPRR Policy.
 - Missing Exception Documentation – Upload document claiming exception signed by appropriate director.

Materials submitted by the project sponsor in response to an “Incomplete” determination will be reviewed by MTC within one week of the submittal date for an updated determination.

- **Project Not Compliant:** The project is determined to be not compliant with MTC’s Complete Streets Policies. For non-compliant projects, MTC staff will work with the project sponsors to schedule a meeting to discuss options and provide guidance for bringing the project into compliance with the Complete Street Policies.

How to Fill Out the Checklist in MTC's Complete Streets Policy Data Portal

Registration and Login



The screenshot shows the login and registration interface for the MTC Complete Streets Checklist Portal. At the top left is a logo consisting of several colored dots. Below it, the text reads "MTC Complete Streets Checklist Portal". There are two main sections: "Login" and "Register". The "Login" section includes an "Email Address" field with the placeholder "name@email.com", a "Password" field with the placeholder "Password", and a "Forgot password?" link. A purple "Login →" button is positioned below the password field. The "Register" link is located to the right of the "Login" heading. At the bottom of the page, there are two logos: the Metropolitan Transportation Commission (MTC) logo and the Association of Bay Area Governments (ABAG) logo.

1. Go to webpage: <https://complete-streets.mtcanalytics.org>
2. Click on “Register” to create a new account if you are a new user.
 - i) Enter email address and project sponsor information and create a password.
 - ii) Verification of your account may take 1-3 days.
3. Once your account has been verified, you may use the account to login the Portal.
4. Click on “Login.”
5. Log into the Complete Streets Policy Data Portal.
 - i) Use the email address and password that you registered.
6. Click on “New Checklist” in the left column to initiate a new checklist.
7. Affirm that the Complete Streets Policy applies to your project by reviewing the criteria in the prompt window and click on the button to acknowledge applicability based on your review.
8. Proceed to Section 1: Contact and Project Information to begin filling out the questions of the Complete Streets Checklist in the data portal as prompted.

Section 1: Contact and Project Information

The screenshot displays the MTC Complete Streets Checklist Portal interface. On the left is a navigation sidebar with the following items: Home, MANAGE (Dashboard, Submissions), EXPLORE (Catalog, New Checklist, Resources), and FAQ. The main content area is titled 'Section 1: Contact and Project Information'. It features a 'Checklist Sections' sidebar with four options: I. Contact & Project Information (selected), II. Pedestrian, Bicycle, and Transit Planning, III. Compliance and Exception Review, and IV. Review & Submit. Below this sidebar is an 'Export Draft PDF' button. The main form contains several fields: 'Contact Name' and 'Email Address' (both with 'Enter response' input boxes), 'Contact Phone Number' (with '(555) 555-5555' as an example), 'Project Sponsor' (with a search/select dropdown), 'County' (with a dropdown menu), and a question 'Is your project seeking regional discretionary funds or an endorsement?' (with a dropdown menu).

1. Contact Information
2. Project Information (name, location, map, description, phase, modes)
 - i) Upload a project area map.
 - ii) If the project seeking funding or a letter of support is part of a larger project, please only provide project information for the specific project or phase that is currently seeking funding or a letter of support. (ie. Construction of one segment of a regional trail system/bicycle network or the first phase of a multi-phase road or freeway construction project)
3. Statement of Exception – Most projects will select "no" to this question in the portal. If you are seeking an exception to the Complete Streets Policy for your project, then you will select "yes" to this question. Refer to the Complete Streets Policy Exceptions Section above for the four allowable exceptions.
4. Save and move to next section. Depending on whether the project is claiming a Statement of Exception, the questionnaire will either proceed to Section 2: Pedestrian, Bicycle and Transit Planning or skip to Section 3: Compliance and Exception Review.

Section 2: Pedestrian, Bicycle and Transit Planning

MTC Complete Streets Checklist Portal
Dev Version 1.0.2

Home

MANAGE

- Dashboard
- Submissions

EXPLORE

- Catalog
- New Checklist
- Resources
- FAQ

Checklist Sections:

- I. Contact & Project Information
- II. Pedestrian, Bicycle, and Transit Planning
- III. Compliance and Exception Review
- IV. Review & Submit

Export Draft PDF

Section 2: Pedestrian, Bicycle, and Transit Planning

Topic: Pedestrian, Bicycle and Transit Planning

The Complete Streets Policy states that projects that are funded all or in part with regional discretionary funding or receiving MTC endorsements must implement Complete Streets as recommended in recently adopted local or countywide plans, such as bicycle, pedestrian, active transportation, Vision Zero, or other systemic safety plan, Community Based Transportation Plans, or transit plan.

Please check all of the relevant plans that this project helps to implement: *

- City/County General + Specific Area Plans
- Bicycle, Pedestrian and/or Active Transportation Plan(s)
- Community-Based Transportation Plan
- ADA Transition Plan
- Station Access Plan
- Transit Plan
- Vision Zero/Local Roadway Safety Plan/Systemic Safety Analysis Report/Comprehensive Safety Action Plan
- Safe Routes to School Plan
- Other

1. Pedestrian, Bicycle and Transit Planning – Identify only plans that promote implementing Complete Streets.
 - i) In the open field question for plan details, please provide the names of the relevant plans identified and a brief description of the recommendation related to CS (ie. Policy, goal, facility type, etc.)
2. Active Transportation Network
 - i) If any part of the project area includes a segment of MTC’s Regional Active Transportation Network, respond “Yes”. Use link provided in the Portal for map of Regional Active Transportation Network.
 - ii) MTC Mobility Hub – If a MTC Mobility Hub is located in the project area, respond “Yes”. Use link provided in the Portal for map of Mobility Hubs.
3. Safety and Comfort
 - i) If the project is on a known High Injury Network (HIN) or a local traffic safety analysis has found a high incidence of bicyclist/pedestrian-involved crashes within the project area, respond “Yes”.
 - ii) Provide a brief summary of the traffic safety conditions within the project area, and describe the project’s traffic safety countermeasures.
4. Bicycle and Pedestrian Facility Design – Identify all of the infrastructure elements that are included in this phase of the Project. Please do not include any infrastructure elements that are a part of other phases of the project or part of a larger project concept that will not be implemented under the current project phase.
5. Equity

- i) If the project improves active transportation or transit in an MTC Equity Priority Community (EPC), respond “Yes”. Use link provided in the Portal for map of EPCs.
 - ii) Please identify all census tracts that are designated as EPCs and affected by this project.
6. Resilience – Identify if the project will integrate any green infrastructure.
 7. Save and proceed to Section 3: Compliance and Exception Review

Section 3: Compliance and Exception Review

MTC Complete Streets Checklist Portal
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Checklist Sections:

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- III. Compliance and Exception Review
- IV. Review & Submit

Export Draft PDF

Section 3: Compliance and Exception Review

Topic: Statement of Compliance

Is this project in compliance with MTC Complete Streets Policy (Resolution 4493)? *

Choose a response...

Is this project in compliance with the MTC Transit Priority Policy for Roadways? *

Choose a response...

Topic: Transit Agency Review

Any project on a roadway with qualifying transit services must have a review signed by senior-level staff or authorized designee at the affected transit agencies to ensure the project considers the needs of transit and/or mitigates project elements that may adversely impact transit operations. Transit agencies must finish this review and provide comments to project sponsors within 20 business days of receipt of project information. For complex projects or extenuating circumstances, transit agencies may request an additional 10 days to complete the review.

Please contact transitpriority@bayareametro.gov for questions on transit coordination and the Transit Priority Policy for Roadways (TPPR).

1. Statement of Compliance
 - i) Review the Complete Streets Policy and confirm compliance.
 - ii) Review the Transit Priority Policy and confirm compliance.
2. Transit Agency Review
 - i) Identify agencies, routes, and facilities and provide transit coordination/review details.
 - ii) Upload signed transit agency review document.
3. Bicycle and Pedestrian Advisory Committee/Commission (BPAC) Review
 - i) Provide a summary of the BPAC meeting comments for the Complete Streets Checklist review.
4. Complete Streets Policy Exception (if applicable)
 - i) If the project is requesting an exception, provide the required responses, and upload documentation detailing how the project meets one or more of the exception conditions. The documentation for an exception must be signed by a Department Director--level agency representative, or their designee. Please

- include name, title and copy of their approval of this exception in email or letter format below.
- ii) The Complete Streets Checklists for projects requesting exceptions MUST still be reviewed by the local or county Bicycle and Pedestrian Advisory Committee (BPAC) prior to submittal of the checklist in the Portal.
5. Transit Priority Policy Exception (if applicable)
 - i) If the project is requesting an exception, provide the required responses, and upload documentation detailing how the project meets one or more of the exception conditions. The documentation for an exception must be signed by a Department Director--level agency representative, or their designee. Please include name, title and copy of their approval of this exception in email or letter format below.
 6. Save and proceed to Review & Submit Section.

Review & Submit

MTC Complete Streets Checklist Portal
Dev Version 1.0.2

Home

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EXPLORE

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Checklist Sections:

- I. Contact & Project Information
- II. Pedestrian, Bicycle, and Transit Planning
- III. Compliance and Exception Review
- IV. Review & Submit

Export Draft PDF

Review & Submit

Please review your information below before submitting your Complete Streets Checklist.

Section 1: Contact and Project Information [Edit] [Expand]

Contact Name: _____ Contact Phone Number: _____
 Email Address: _____ Project Sponsor: _____

Section 2: Pedestrian, Bicycle and Transit Planning [Edit] [Expand]

Status: Section 2 responses recorded

Section 3: Compliance and Exception Review [Edit] [Expand]

Status: Section 3 responses recorded

Note: By submitting this checklist, you confirm that all information provided is accurate and complete.

Submit Complete Streets Checklist

1. Project Sponsor Review
 - i) Review and make any edits. (Do not submit the checklist until after BPAC review has been completed)
 - ii) Prior to BPAC review:
 - (1) Save and download a copy of the draft checklist for BPAC review using the “Export Draft PDF” button.
 - (2) Do not submit the checklist until after BPAC review has been completed.
 - iii) After BPAC review:
 - (1) Provide a summary of the BPAC meeting comments for the Complete Streets Checklist by completing the question under the Bicycle and

Pedestrian Advisory Committee/Commission Review Topic in Section 3: Compliance and Exception Review.

- (2) Review, make any other necessary edits, and submit the final checklist by clicking on the “Submit Complete Streets Checklist” button.
2. After the final checklist has been submitted, the status of the checklist can be viewed on the MTC Complete Streets Portal. Typically, MTC reviews checklists within 3-weeks from submission.
3. Project sponsors can review and edit the checklist at any time although the checklist should not be edited after it has been submitted for MTC review without first notifying MTC staff via completestreets@bayareametro.gov.
4. Project sponsors can view and edit any checklist that has been submitted by other staff in the same agency.

FAQs

Q: What is the Complete Streets Checklist?

A: The Complete Streets Checklist is the mechanism to ensure MTC Complete Streets Policy and MTC Transit Priority Policy for Roadways compliance. Projects in the public right-of-way that are receiving or requesting \$250,000 or more of regional discretionary funding need to fill out a Complete Streets Checklist, have it reviewed by a local or county Bicycle and Pedestrian Advisory Committee (BPAC), or the equivalent, have it reviewed by applicable transit agencies, and submit the checklist before the project can be considered for funding.

Q: Where can I find the MTC Complete Streets Policy?

A: Please find the Policy here: https://mtc.ca.gov/sites/default/files/documents/2022-05/Resolution-4493_approved.pdf

Q: Where can I find the MTC Transit Priority Policy for Roadways?

A: Please find the Policy here: <https://mtc.ca.gov/digital-library/5135300-transit-priority-policy-roadways-mtc-resolution-no-4739>

Q: When should the Complete Streets Checklist be submitted?

A: The Complete Streets Checklist should be submitted before you apply for funding through MTC. At a minimum, MTC requests that project sponsors submit the Complete Streets Checklist (including BPAC and transit coordination materials) 2 months prior to allocation.

Q: Does the Complete Streets Policy and Checklist apply to my project?

A: If your project is seeking at least \$250,000 of regional discretionary funding or an endorsement, and is in the public right-of-way, then the Complete Streets Policy applies and a Complete Streets Checklist is required.

Examples of projects and their applicability:

Purchase of new bus fleet – not applicable

Upgrading computer software – not applicable

Improvements to a bus yard – not applicable

Railway project with street crossings or station access – applicable

Q: Under what circumstances is a project required to conduct transit agency review as part of the Complete Streets Checklist?

A: Transit agency review is required for any project along a public roadway in the nine-county Bay Area, including both surface streets and access-controlled highways, with transit service. This includes published transit routes, non-revenue routes, detour routes, and planned budgeted routes. See this document for details:

<https://mtc.ca.gov/digital-library/5135342-bay-area-transit-priority-policy-roadways>

Q: When does the Complete Streets Checklist need to go to the Bicycle and Pedestrian Advisory Committee (BPAC)?

A: MTC recommends that the project's Complete Streets Checklist goes to the BPAC approximately 2-5 months prior to the project application submission or allocation. Due to varying BPAC schedules and potential cancellations, it is necessary to bring the project's Complete Streets Checklist to the BPAC several months in advance of funding application or allocation.

Q: If I already submitted a Complete Streets Checklist for a different funding program, do I need to need to submit a NEW Complete Streets Checklist for another funding program?

A: No. You can edit your existing Complete Streets Checklist and select any additional funding program(s) the project is receiving. However, if the project has undergone significant design changes that alter the safety, comfort, or access of pedestrians

and/or bicyclists or transit operations, then an UPDATED Complete Streets Checklist is required and must be reviewed by the BPAC and applicable transit agencies.

Q: How do I edit my Complete Streets Checklist?

A: After you log into the portal, you can edit your checklist, download a PDF, and check its status.

Q: Who do I contact if I have other questions about the Complete Streets Checklist?

A: Please email completestreets@bayareametro.gov

Q: How do I contact transit agency(ies)?

A: Transit agency contacts can be found on this form: <https://mtc.ca.gov/digital-library/5135367-transit-agency-contact-list>

If you need assistance contacting a transit agency, please email transitpriority@bayareametro.gov.

Q: When should I contact transit agency(ies) for review?

A: Coordination with transit agencies should occur as early as possible and with a project application or funding request, not after.