



Flathead County

Planning & Zoning

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APPLICATION FOR A CTEP PROJECT PROPOSAL

*Submit this application and all required information
to the Planning & Zoning office no later than **5:00 pm October 1** at the address listed above.*

Before completing and submitting this application please read and be familiar with: the Flathead County Community Transportation Enhancement Program (CTEP) Administrative Policies (amended 5/15/12) ¹, the Flathead County Trails Plan (adopted 10/12/10) ², and the Montana Department of Transportation CTEP Manual ³.

This application must be accompanied with all materials and supporting information and documentation described in the 'Initial Project Proposals' section of the Flathead County Community Transportation Enhancement Program (CTEP) Administrative Policies (attached).

1. PROJECT NAME: _____

2. PROJECT TYPE (CTEP ENHANCEMENT CATEGORY): _____

3. PROJECT LOCATION: _____

4. ORGANIZATION/LOCAL SPONSOR:

Contact Name: _____

Address: _____ Phone: _____

City/State/Zip: _____

Email: _____

5. INTEREST IN PROJECT: _____

6. TECHNICAL/PROFESSIONAL ASSISTANCE:

Name: _____

Address: _____ Phone: _____

City/State/Zip: _____

Email: _____

Resources

¹ Flathead County CTEP) Administrative Policies (amended 5/15/12)
http://flathead.mt.gov/planning_zoning/downloads.php > Miscellaneous

² Flathead County Trails Plan (adopted 10/12/10)
http://flathead.mt.gov/planning_zoning/downloads.php > Flathead County Trails Plan

³ Montana Department of Transportation CTEP Manual
<http://www.mdt.mt.gov/business/ctep/> > Manual

**FLATHEAD COUNTY
COMMUNITY TRANSPORTATION ENHANCEMENT PROGRAM (CTEP)
ADMINISTRATIVE POLICIES**

INTRODUCTION & BACKGROUND

The Program:

The Community Transportation Enhancement Program (CTEP) is a federally funded reimbursement program administered by the Montana Department of Transportation (MDT) that provides annual funding to local communities to develop pedestrian and bicycle trails and other transportation-related enhancements. CTEP funding currently covers 86.58% of the cost of approved projects and local communities are responsible for the remaining 13.42%, an amount referred to as the “local match.”

CTEP funded projects are planned, applied for, and overseen directly by the local tribal, municipal or county government. Typically, local matching funds are budgeted and provided by the municipal or county government. Historically, Flathead County has not budgeted for the local match, thus private organizations have initiated trail projects and raised funds to provide the required local match portion. The Flathead County Planning and Zoning Office (FCPZ) has provided support to private organizations by preparing, submitting and administering CTEP projects and overseeing construction to ensure compliance with CTEP program requirements. A typical CTEP project will follow an approximately 36-month lifespan from the initial application by the private organization through project completion.

The Pros:

The Flathead County model for CTEP projects has created a variety of pedestrian and bicycle trails throughout the county that provide safe routes to schools, serve active recreation interests and promote transportation alternatives. Private organizations that have worked hard to develop specific trails have a sense of ownership and are therefore more likely to help maintain the trail and organize promotional events and subsequent fundraisers. Taxpayer costs are lessened because local matching funds are privately raised and only the administration of the program (staff time) is funded by local tax dollars.

The Problems:

The Flathead County model for CTEP projects has led to some problems as a result of unclear policies and guidelines. Projects are planned and applications are accepted for trails wherever a private organization has the interest and means to have a trail built. This method of trail programming has led to 1-3 mile bits of trails spread throughout the county, with less than optimum coordination to connect existing trails or guide new trail construction towards areas with maximum public benefit.

Initial planning and application materials generated by volunteer private organizations without professional oversight may lack sufficiently accurate project details and cost estimates. Once a trail project is approved, Flathead County government is recognized as the applicant and project owner by MDT but has no funding budgeted for local matching funds. Inadequate original cost estimates and shortfalls in private organization fundraising can lead to project cost overruns and frustration for all involved. Furthermore, once CTEP projects are complete, the ongoing maintenance requirements and associated expense can be burdensome without an additional revenue stream to match the additional expense.

POLICIES

This policy document is intended to complement the Flathead County Trails Plan and provide guidelines specific to privately initiated and sponsored CTEP trail projects administered by FCPZ. Non-CTEP trails addressed in the plan using other public, private, or combinations of funds are not specifically subject to these policies.

Initial Project Proposals

- FCPZ will create a CTEP funding cycle with an annual deadline for initial project proposals from private organizations and estimated major checkpoints, deliverables and deadlines over a 36-month project lifespan. This document will be a guideline to improve understanding of the CTEP process by all participating entities and to determine how projects are progressing and will not be construed as binding or regulatory on any participating entity.
- Initial project proposals prepared by a private organization must contain:
 1. Cover letter addressing in detail the criteria found in Appendix C of the Flathead County Trails Plan (Trails Plan) (available on the FCPZ website), along with supporting documents;
 2. A preliminary design report containing a cost estimate for design and construction of the project based on current prices for engineering services, materials, and construction labor compliant with applicable Federal Davis-Bacon Wage Rates. The preliminary design report shall contain pertinent and accurate information regarding project scope and configuration from which a realistic cost estimate may be based. Information contained in the preliminary design report should address specific conditions encountered along the proposed route such as topography and cross slopes, soils and slope stability, constraints posed by natural/environmental features, and constraints posed by existing improvements, utilities, and other infrastructure. In addition to costs estimated for design and construction of typical non-constrained sections of the project, the cost estimate should include estimated costs for anticipated special engineering and construction techniques necessary to overcome recognized constraints. The cost for preparation of the preliminary design report and cost estimate is not reimbursable with CTEP funds;
 3. Evidence that easements exist for the proposed trail;
 4. An acknowledgement of the group's requirement to raise 50% of the local match amount (local match is 13.42% of total project cost, as determined at this point in preliminary design report) prior to the Flathead County Board of Commissioners (Commission) signing the Project Specific Agreement (PSA) with MDT, an additional 25% of the local match amount prior to signing a contract with a consulting engineer and the final 25% of the local match amount prior to signing a contract with a construction contractor;
 5. A trail maintenance plan, to include a signed agreement to raise funds for a project maintenance fund, a plan to continue fundraising for this account, and a plan for routine maintenance of the proposed trail. Criteria for this plan are found in Chapter 3 of the Trails Plan.
- If no project proposals are received prior to the initial project proposal deadline, Flathead County's unencumbered allocation may be accrued and applied to future annual funding

cycles or redistributed to one of the other local entities within Flathead County, at the County's discretion.

Project Selection

- FCPZ staff will provide a review of initial project proposals for content and adequacy prior to forwarding to the Flathead County Parks Board (Parks Board).
- The Parks Board will evaluate CTEP project proposals and make a recommendation to the Commission, per Appendix C of the Trails Plan.
- The Commission will make the final selection of initial project proposals that will proceed to preparation by FCPZ staff of the formal MDT CTEP project application.
- If a project proposal does not meet the evaluation criteria found in Appendix C of the Trails Plan, or if funding, maintenance commitments, and/or easement provisions are not adequate, the project will not be selected.
- If a project proposal is not selected by the Commission, private organizations may re-apply for future funding cycles.
- If no project proposals are selected, or if a portion of annual CTEP funding remains unencumbered, Flathead County's unencumbered allocation may be accrued and applied to future annual funding cycles or redistributed to one of the other local entities within Flathead County, at the County's discretion.

Project Administration

- FCPZ will prepare application materials for MDT applications for those projects selected by the Commission.
- All local match for CTEP project costs will be the responsibility of the private organization sponsoring the project.
- The private organization sponsoring the project will be responsible for creating a project maintenance fund for long-term maintenance. The fund must be "seeded" by the private organization with an amount equal to or exceeding 50% of the local match amount (as determined in the preliminary design report) prior to the Commission signing the PSA.
- Prior to signing the PSA, the Commission will require from the private organization:
 1. A contract signed by the private organization and the Flathead County Commissioners establishing the roles, responsibilities, and expectations of each party for the successful completion of the project.
 2. Evidence that 50% of the local match exists in the account that the private organization will use to reimburse Flathead County for project costs.
 3. Evidence that a separate, additional project maintenance fund account unique to the project has been established with the Flathead County Treasurer's Office containing 50% or more of the local match amount, as determined in the preliminary design report. The purpose of the project maintenance fund is to generate revenue off the principal amount for routine maintenance of the project and for the principal to be available as needed over time for larger trail expenditures such as crack or pothole filling, sealing, etc. Contributions, donations and/or gifts to this fund shall be unconditioned and use of said funds shall be at the sole discretion of Flathead County for issues pertaining to the specific trail.

4. Acknowledgement that the scope of the project will be reduced if necessary to keep the project within the approved budget and avoid cost overruns.
- Prior to substantial completion of the project, Flathead County will match the amount in the project maintenance fund account, up to 50% of the local match amount as determined in the preliminary design report.
 - Proceeds from the separate project maintenance fund account shall be directed to the Flathead County Weed, Parks and Building Maintenance Department and that department shall use those proceeds for short and long term maintenance of the project.
 - Selection of an engineering firm to perform design engineering and construction engineering will be done by the Commission, after review of candidates by professional county staff, to include the Public Works Director, the Weed, Parks and Building Maintenance Director, the Planning Director and a Deputy County Attorney.

Project Construction

- Construction bid documents prepared by the project engineer shall limit the scope of the project to fit within the budget approved by the Commission when the project specific agreement was signed.
- Change orders needed to avoid significant and immediate threats to public health and safety (such as ruptured water lines, power supplies, etc.) may be approved by the CTEP Administrator/Planning Director or his/her designee if time does not permit review and approval by the Commission. Change orders requested as a result of unanticipated design complications, which have multiple potential solutions, shall be reviewed and approved by the Commission. MDT shall also be consulted on all change orders.
- Change orders shall be approved prior to work being performed and costs being incurred.

Redistribution of CTEP Funding

- When Flathead County chooses to redistribute CTEP funding to other local entities, those entities will be notified of the redistribution and requests will be collected. Other local entities to which Flathead County's CTEP funding could be redistributed are the Confederated Salish and Kootenai Tribes and the cities of Columbia Falls, Kalispell and Whitefish.
- Requests for redistribution from other local entities must contain a description of projects for which the allocation will be used, and requests will be reviewed by the Parks Board, using the criteria found in Appendix C of the Trails Plan.
- Priority will be given to projects that meet the criteria as well as provide the most benefits to both residents of the local entity as well as Flathead County.
- After considering the recommendation of the Parks Board, the Flathead County Commissioners shall choose the local entity and project to which CTEP funding is redistributed.