

## **3.5.5 PLANNING AND DESIGN FUNDS (CATEGORIES 3 & 4)**

### **Description**

Planning and Design funds are a part of the Technical Assistance Program (TAP) described in Chapter 4. Planning and Design funds are intended to provide recipients with the financial resources to perform work in planning and/or designing a park, trail, open space, or other recreation project.

#### *Planning*

Planning funds provide resources to complete a range of planning efforts such as park master plans, feasibility studies, and other site studies required to effectively plan and design a park project. Park master planning includes planning assistance for Study Areas that lack current park master plans, whose plans are outdated, and/or have identified major demographic or physical changes that prove their current plans obsolete. While the 2016 PNA included the identification of priorities for park projects, further examination of community-wide park system and project needs could help agencies and groups refine and expand on the list of priority projects for both competitive grants and annual allocations. Site studies would inform acquisition and development of new parks, and/or additions to existing parks, and could evaluate elements such as physical context and site conditions, land use and zoning compatibility, traffic, safety, and utilities. Assistance related to necessary environmental compliance and permitting required for site acquisition and development may also be provided.

#### *Design*

Design funds provide resources to complete design services and could include a preliminary conceptual design, design development drawings, or construction documents. Services could also include specific tasks such as landscape design, materials selection, design of stormwater treatment elements, or incorporation of best management practices.

### **2018 Funding Amount**

\$2,500,000 (17% from Category 3 General Competitive funds and 20% from Category 4 General Competitive funds)

### **Project Types**

Below is a non-exhaustive list of projects that may be eligible for funds under the Planning and Design funds program.

- Park master plans
- Feasibility studies
- Site plans or studies
- Environmental planning/compliance

- Park or trail design development and construction documents

## **Project Requirements**

### *Project Eligibility*

- The applicant must be enrolled with RPOSD, and determined by RPOSD to be eligible to apply for Planning and Design funds. See Section 4.6.6 in Chapter 4, Technical Assistance Program, for additional details.
- The proposed project's schedule is a maximum of two years.
- The applicant must not have an open planning/design grant with RPOSD.

### *Project Feasibility*

#### Land Access/Tenure

- Agency has a plan as to how access or tenure will be acquired or arranged.

#### Permitting and CEQA Compliance

- Agency has a general timeline and approach as to how and when permitting and CEQA will be completed; or
- If permitting and/or CEQA compliance are not applicable to the project, applicant has an explanation as to why not.

#### Adverse Site Conditions (e.g., overhead or underground utilities, toxic contamination, etc.)

- Adverse site conditions are known to exist but have not been characterized. Agency has plans as to how and when these conditions will be addressed, with appropriate budget contingencies in the project budget; or
- The proposed project seeks to identify adverse site conditions on the project site.

#### Project Cost and Funding

- Agency has a budget consistent with the level of planning and design completed to date, as well as a plan for funding to cover the budgeted costs, with appropriate contingencies given the level of planning completed.

#### Project Schedule

- Agency has a schedule from fund award receipt to project completion that reflects the level of planning, design, permitting and community involvement that will be necessary for the planning/design project.

## **Award Size**

Requested fund awards must meet the minimum and maximum award size requirements. Proposed projects will be categorized into different thresholds of award size brackets depending on the requested size of the award.

Minimum: \$20,000  
Maximum: \$250,000

### *Brackets*

Small: \$20,000 - \$99,999  
Medium: \$100,000 - \$174,999  
Large: \$175,000 - \$250,000

### **Evaluation Criteria**

*NOTE: Evaluation criteria for Planning and Design projects have been drafted in a manner similar to those presented at the January 11<sup>th</sup> Steering Committee. These criteria will be revisited by the RPOSD and consultant team after the March 1<sup>st</sup> Steering Committee meeting, which will focus on a discussion of evaluation criteria and scoring. Revised evaluation criteria and scoring for Planning and Design grants will be shared with the Steering Committee in advance of the April 5, 2018 Steering Committee Meeting.*

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