

Project Delivery Directive

Number: PDD-16R1

TO: Project Delivery Employees

References: Deputy Directive 41

Deputy Directive 93

Project Delivery
Directive 12

Effective Date: May 8, 2026

Supersedes: October 9, 2018

Review by: May 8, 2028

TITLE: Advance Mitigation Program Capital Charging Practices

DIRECTIVE

This directive establishes capital and support charging practices for all staff involved in delivering advance mitigation projects through the Advance Mitigation Program (AMP).

Advance Mitigation Account (AMA) funds shall be used to cover only Capital Outlay Support (COS) and Capital Outlay Project (COP) costs resulting from project direct work.

All advance mitigation projects receiving AMA funds must develop and manage project work plans consistent with the workload breakdown structure (WBS). Districts should ensure that only staff who have a role in delivering AMP projects are assigned and allowed to charge to AMP projects.

BACKGROUND

California Streets and Highway Code (SCH) 800 et. seq. authorized the establishment of the AMP and the AMA. The AMP allows Caltrans to deliver advance mitigation projects to provide mitigation for anticipated transportation projects to accelerate transportation project delivery. Administration of the AMP requires statewide advance planning. Delivery of advance mitigation projects requires project specific support and capital expenditures. Project specific expenditures related to the AMP must be accurately resourced and accounted for.

RESPONSIBILITIES

Division Chiefs for Construction, Design, Engineering Services, Environmental Analysis, Project Management, and Right of Way and Land Surveys:

- Provide statewide direction to support compliance with this directive.
- Develop and implement procedures, guidance, and tools, if applicable.

District Directors:

- Support the implementation of this directive.
- Assign appropriate resources for the activities outlined in this directive.

Deputy District Directors and District Office Chiefs:

- Support and advance the policies and standards of the AMP.
- Share this directive with functional units responsible for delivering products and services related to the AMP.
- Expose functional managers to charging practices training.

Project Managers:

- Develop each advance mitigation project workplan in accordance with the WBS.
- Ensure that only staff who are necessary to deliver the AMP project are assigned and allowed to charge to it.
- Verify the project has been programmed.
- Arrange to have the project phase(s) opened in the proper systems and at the necessary times to allow staff to charge correctly, and conversely, are closed to prevent incorrect charging where appropriate.
- Check that project coding is complete and accurate.
- Provide functional managers with the proper project-specific charge code information (e.g., Project ID), as well as a copy of this directive.
- When incorrect charges are identified, request the employee and his/her supervisor make necessary corrections.

Project Delivery Managers, Functional Managers, and Task Managers:

- Communicate to their project managers, supervisors, and others as applicable the intent of this directive, and the issues and problems related to improper AMP charging practices.

- Provide all project team members with the proper charge code information.
- Provide all project team members with charging practices training, and the proper staff time and operating expense charge code information.
- Verify that all functional project-related expenditures are correct.

Supervisors:

- Provide their employees with charging practices training, and the proper staff time and operating expense charge code information for the work assigned to them.

Employees:

- Charge their time appropriately.



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Project Delivery

07/22/2026

Date Signed