



SB1 Grant Application Template Guidelines

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OVERVIEW

Senate Bill 1 (SB1), also known as the Road Repair and Accountability Act of 2017, was passed to increase transportation funding and institute much-needed reforms. As part of its implementation plan, the California Transportation Commission (CTC) has created a number of programs to provide funding. These guidelines provide resources for two of these programs – the Solutions for Congested Corridors Program (SCCP) and Trade Corridor Enhancement Program (TCEP).

The below resources are available to support SCCP and TCEP applications:

- Application templates (InDesign / Word formats)
- Template Instructions (InDesign / Word)
- Accessibility Review Checklist
- Accessibility Best Practices PowerPoint file
- Accessibility Best Practices Webinar
- Remediation Support
 - Remediation best practices
 - Direct remediation support from Planning & Modal Program Management
 - Referrals for remediation services by Allyant

Document Compliance with the Americans with Disabilities Act (ADA)

The ADA is a federal law prohibiting discrimination against individuals across all aspects of public life, including employment, transportation, and public spaces. Its purpose is to ensure equal rights, access, and opportunities.

CTC requires that all SB1 grant applications be ADA compliant, meaning that a document meets certain accessibility standards. SB1 grant applications must conform to Level AA compliance to WCAG 2.0 or subsequent standards. This compliance is accomplished through a process called remediation. Grant application resources provided by PM² are designed with accessibility in mind to help nominating agencies not only create a professional-looking document, but to also decrease the amount of remediation that is required after the document is finalized.

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TEMPLATE DO'S & DON'T'S

When using the provided template(s), please review the following parameters to ensure appropriate use and ADA compliance.

Do

- **Select a cover page.** Each template has four cover page options. Delete any unused cover pages.
- **Use the built-in Styles / Paragraph Styles.** Assign formatting to text through the pre-built Styles / Paragraph Styles. This ensures consistency throughout the document and considers ADA compliance guidelines. Below is guidance for when to use specific Styles/Paragraph Styles:
 - **Heading 1 / H1:** Use for the Project Title on the cover page. This style should not be used anywhere else in the document.
 - **Heading 2 / H2:** Use for any section name (e.g. General Information)
 - **Heading 3-5 / H3-5:** Use for subsections under Heading 2. These should move in numbered order; no heading level can be skipped
 - **Normal:** This is the most commonly used style and should be used for all body content
 - **TH:** Use for header cells in a table
 - **TD:** Use for non-header cells in a table
 - **Footnote:** Use for footnotes
 - **Subtitle:** Use for the subtitle on the cover page (indicated in parentheses)
 - **Quote:** Use for content in the blue call-out box
 - **Caption:** Use for photo captions
 - **TOC 1-2:** These styles are specific to the Table of Contents
 - **Header / Footer:** These styles are used for content in the header / footer
- **Remove any red text.** Red text has been added as a guide for what Style / Paragraph Style should be assigned to that specific heading level. The red text should be removed in the final version.
- **Add content for bracketed placeholders.** Brackets are used to denote areas that should be replaced with specific content (i.e. [Project Title Name Goes Here]). Be sure to add the suggested content and remove the brackets.
- **Replace sample photos/gray placeholders with final visuals.** There are two types of placeholders in the templates: (1) Sample photos and (2) Gray placeholders. These should be replaced with final assets (i.e. logos, photos, PDFs, etc.) in the application or deleted. See Photos / Placeholders section for instructions for how to replace in each template format.
- **Move/duplicate elements, as needed.** Elements such as photos, tables, and call-out boxes are intended to be duplicated or moved, as necessary. All have been designed with text-wrap to allow text to move around the element.

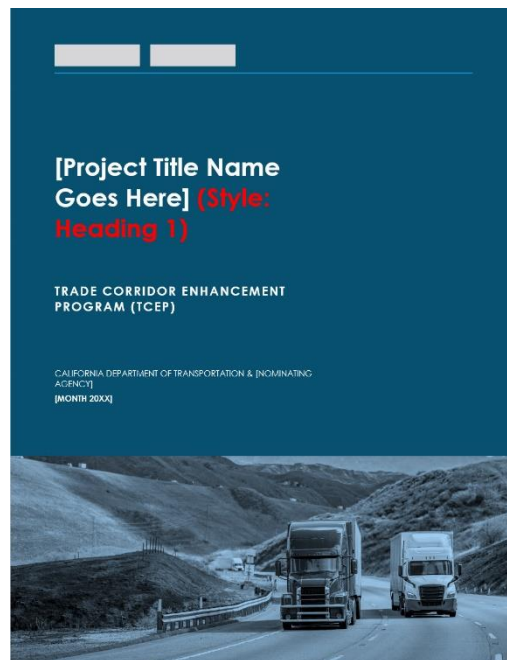


Photo 1: Example of a cover page from the TCEP template.

- **Update the Table of Contents.** The Table of Contents is designed to pull in specific heading levels used throughout the document. If the built-in Styles / Paragraph Styles have been used correctly, updating this portion of the document should require little effort. Save this step for last, as page numbers can easily change if content is added/removed.

Do Not

- **Change text size.** Changing text size may distort formatting and lead to issues throughout the document.
- **Change text/element color.** Text and element color is currently ADA accessible and changing the color may lead to non-compliance. **Note:** *Text color is assigned in the template based on the background color it appears on. For text that appears on non-white backgrounds, manual color updates have been noted in red.*
- **Change font style.** CTC does not define a font style to use in applications; however, the California Department of Transportation (Caltrans) recommends Century Gothic whenever possible. Changing the font style may distort formatting and lead to issues throughout the document.

TEMPLATE INSTRUCTIONS – INDESIGN

The InDesign template is the recommended template for the SCCP and TCEP applications. However, if InDesign is not available, a Word template has been provided. InDesign is recommended over Word for greater control of content formatting and for a more streamlined remediation process.

Paragraph Styles

The Paragraph Styles panel outlines text styles assigned to specific parts of the document. Paragraph styles are used throughout the template to maintain consistency.

Accessing the Paragraph Styles Panel

From the top ribbon, select **Window > Styles > Paragraph Styles**. The paragraph panel will appear on the right side of the screen.

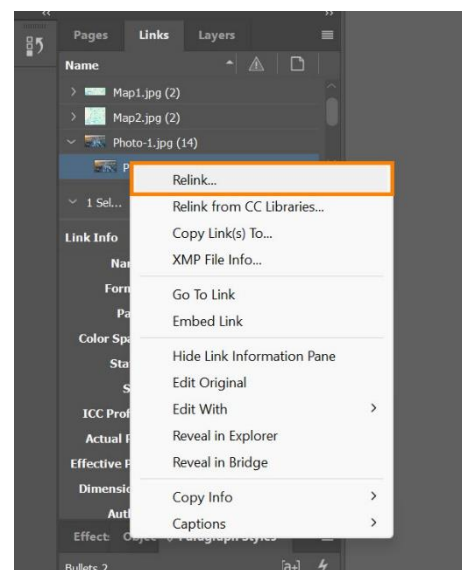
Assigning a Style to Text

- Highlight the text and open the Paragraph Styles panel (see above).
- Select the appropriate paragraph style from the menu. The text will automatically change formatting.

Photos / Placeholders

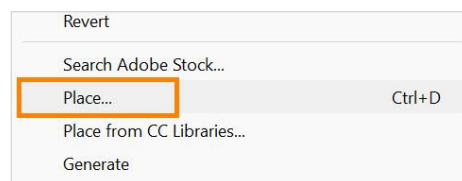
Placing Photos/Graphics in Photo Placeholder

- Select just the existing photo (may need to double-click if the photo is grouped with a caption)
- Select the Links panel (**Window > Links**)
- If the existing photo placeholder is selected, that file will be highlighted in the menu. Right-click and select **Relink...**
- Select new photo/graphic and then select **Open**
- The new photo / graphic will be pulled into the placeholder. It is possible that the photo / graphic will need to be resized within the frame. Double-click the photo frame and an orange / brown outline will appear. This is the outline size of the actual photo / graphic. Hold down Shift and use the corner boxes to click and drag, resizing the image within the frame.



Placing Photos/Graphics in Gray Placeholder

- Select the gray box, then click **File > Place...**
- Select new photo/graphic and then select **Open**
- The new photo / graphic will be pulled into the placeholder. It is possible that the photo / graphic will need to be resized within the frame. Double-click the photo frame and an orange / brown outline will appear. This is the outline size of the actual photo / graphic. Hold down Shift and use the corner boxes to click and drag, resizing the image within the frame.



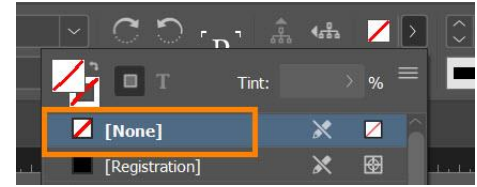
- If there is a gray background behind the photo / graphic, it can be removed by selecting the graphic and then selecting **None** in the dropdown menu of the **Fill** field

Adding Captions & Alt-Text

The InDesign file has some automation built-in so captions and alt-text can be derived from the file information.

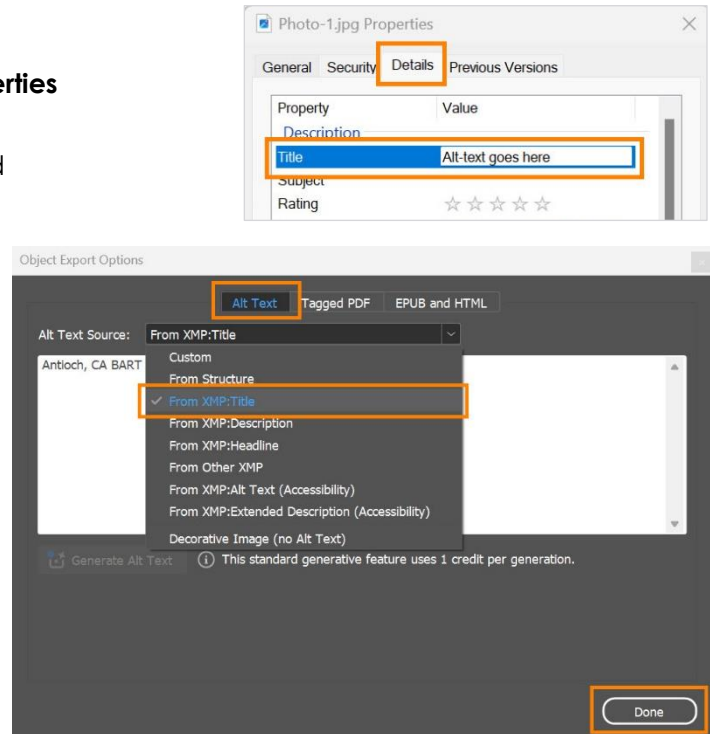
Update the File Description

- Right-click the image file and select **Properties**
- Select the **Details** tab
- Add an alt-text description in the **Title** field
- Click **OK**



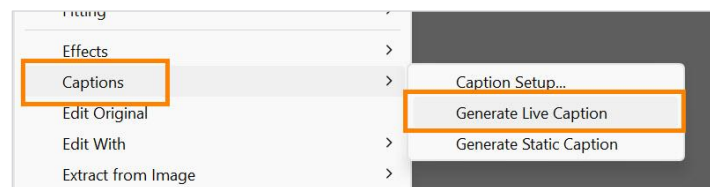
Update Alt-Text

- Right-click the placed image in InDesign and select **Object Export Options...**
- Select the **Alt Text** box in the top ribbon
- Next to **Alt Text Source**, select **From XMP:Title** from the dropdown menu
- Click **Done**



Update Caption

- There is currently a placeholder caption in the template for demonstration purposes. Select the caption and **Delete**
- Right-click the image in InDesign and select **Captions > Generate Static Caption**. The caption will pull from the image metadata, but will apply the appropriate caption style and will be grouped with a text wrap with the image



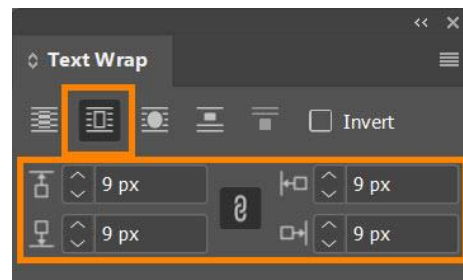
The new caption will be grouped with the photo; however, the original text wrap around the group will be lost. To add the text wrap back:

- **Go to Window > Text Wrap**
 - In the Text Wrap panel with the photo/caption group selected, select the second option to **Wrap around bounding box** and then add a 9 px wrap on all sides.

Adding Text Wrap

All existing placeholders have a text wrap assigned. If new photos/graphics are brought into the document or the text wrap is removed when the photos is replaced, add the text wrap back:

- Open the Text Wrap panel by selecting **Window > Text Wrap**
- Select the photo/graphic and then in the Text Wrap panel, select **Wrap around bounding box**
- Ensure the element has a 9 px wrap on all sides



Other Areas to Adjust

Cover Information

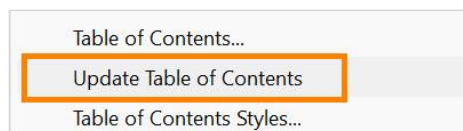
There are several placeholders on the cover for information. Ensure the following information is updated:

- **Logos:** Add logos for each of the nominating agencies
- **Month 20XX:** Add the correct month/year for the submission date
- **Project Title:** Add the project title, using H1
- **Nominating Agencies:** The California Department of Transportation is already listed. Ensure that any other nominating agency is listed here as well.
- **Photos:** Replace these placeholder photos with graphics relevant to the project

Table of Contents

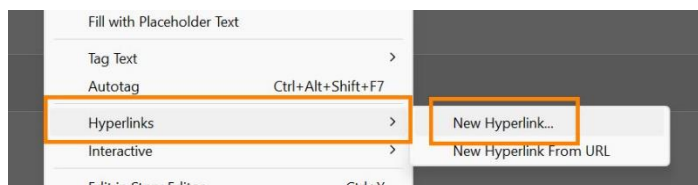
The Table of Contents is set up to automatically bring in specific heading levels. This is another reason why it is imperative to use appropriate heading levels throughout the document. To update the table of contents:

- Select the table of contents
- Select **Layout > Update Table of Contents**
- A dialog box will appear, noting that the table has been updated. Click **OK**



Hyperlinks

- Hyperlinks are not automatically generated in InDesign and must be added manually.
- Select the text or URL to hyperlink
- Right-click and select **Hyperlinks > New Hyperlink**

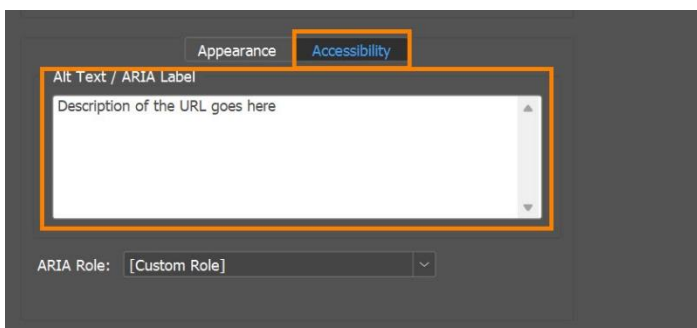
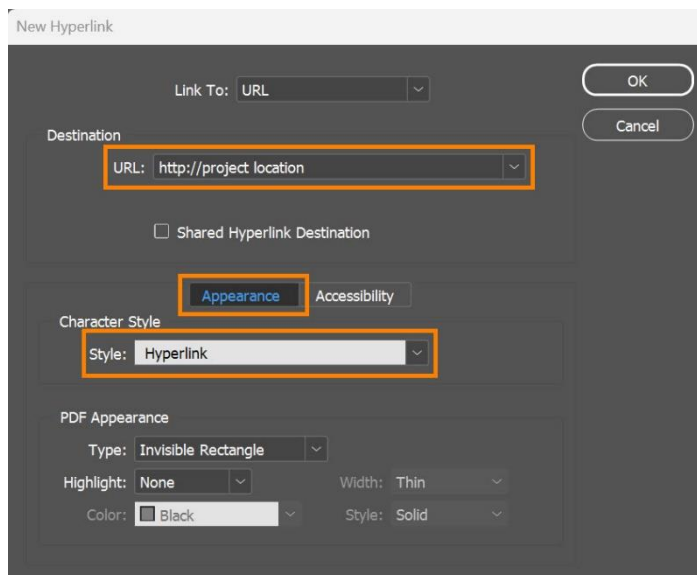


- In the dialog box that appears, add the full URL for the hyperlink in the **URL** field
- Under the **Appearance** tab, Select **Hyperlink** from the Style dropdown menu.
- Under the **Accessibility** tab, add alt-text to describe where the link directs.
- Click **OK** when complete

Important Note

File management is essential when working with InDesign. When an image or graphic is placed into the layout, it creates a link to that specific file's location on a device. If that file is moved or deleted, it will result in a broken link in the InDesign file, which can result in image quality issues or an inability to export the document to PDF.

Best practice is to create a project folder that houses the InDesign file and a Links folder for all images and graphics that are linked to the InDesign file. Be sure to also include template assets in this Links folder.



TEMPLATE INSTRUCTIONS - WORD

Styles

The Styles panel outlines text styles assigned to specific parts of the document. Styles are used throughout the template to maintain consistency.

Accessing the Styles Panel

- Select **Home** from the top ribbon.
- Click arrow in the lower right corner of the Styles section to expand the paragraph styles.

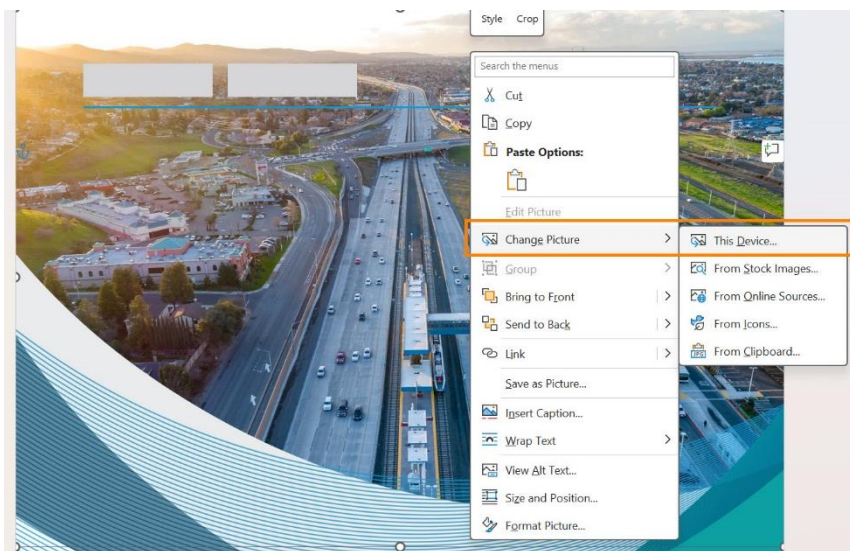
Assigning a Style to Text

- Highlight the text and open the **Styles** panel (see above).
- Select the appropriate paragraph style from the menu. The text will automatically change formatting.

Photos / Placeholders

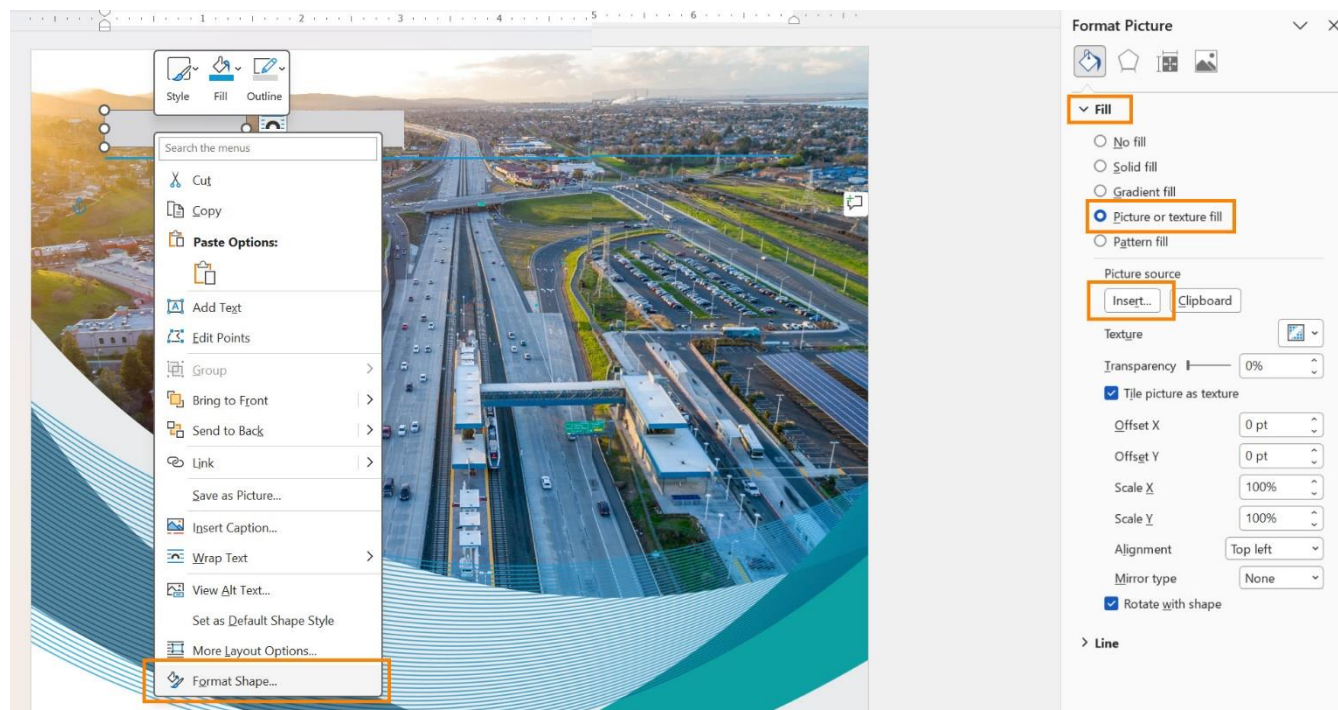
Placing Photos/Graphics in Photo Placeholder

- Select just the existing photo (may need to double-click)
- Right-click and select **Change Picture**
- Select new photo/graphic and then select **Insert**
- The dimensions may change. Resize the image using the **Picture Format > Crop** tool



Placing Photos/Graphics in Gray Placeholder

- Select the gray box
- Right-click and select **Format Shape...**
- Select **Fill**, then **Picture of texture fill**
- Under Picture Source, select **Insert**
- Select new photo/graphic and then select **Insert**
- The dimensions may change. Resize the image using the **Picture Format > Crop** tool.

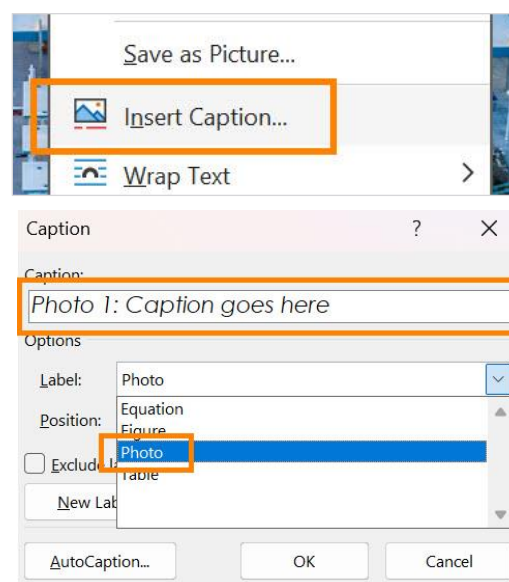


Adding Captions

If using a placeholder, the existing template caption can be edited by double-clicking and modifying the text. To add a new caption:

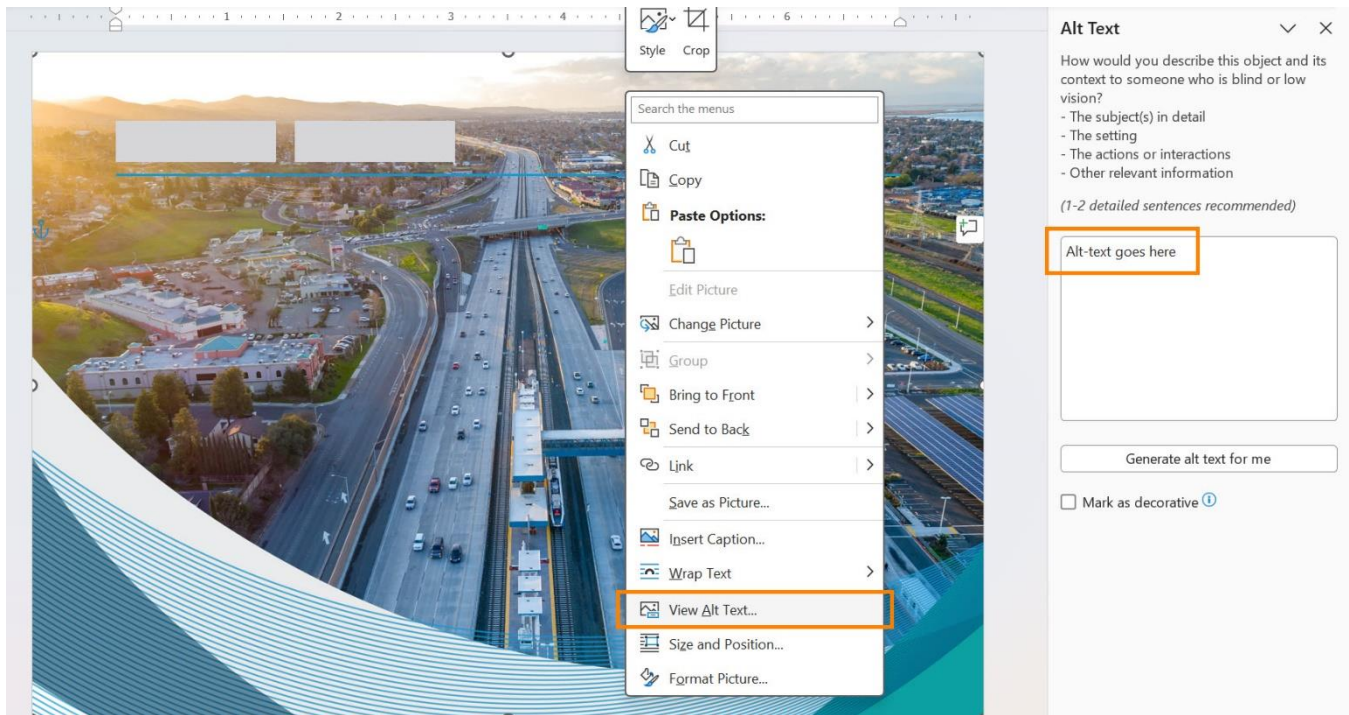
- Select the photo
- Right-click and select **Insert Caption**
- From the **Label** field, select the dropdown for the appropriate caption type (e.g. Photo)
- Add a colon (:) after the number, then type the caption
- Click **OK**

The caption will be added below the photo/graphic. To group these together, select the photo/graphic and the caption (CTRL-click to select multiple elements) and then right-click and select **Group > Group.*



Adding Alt-Text

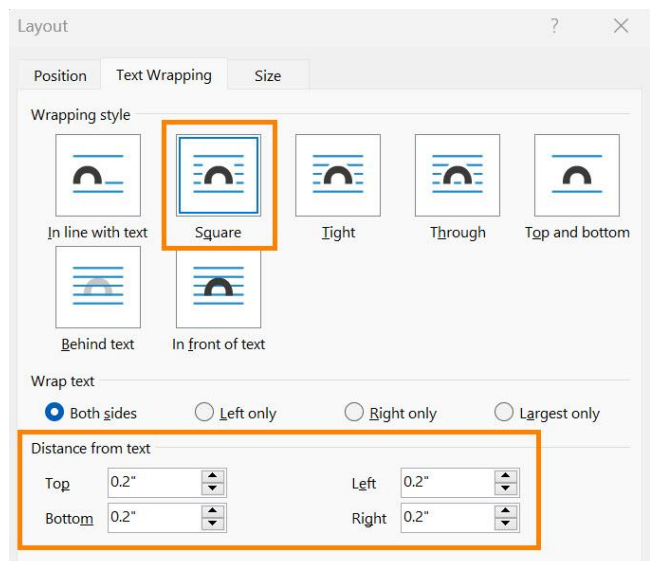
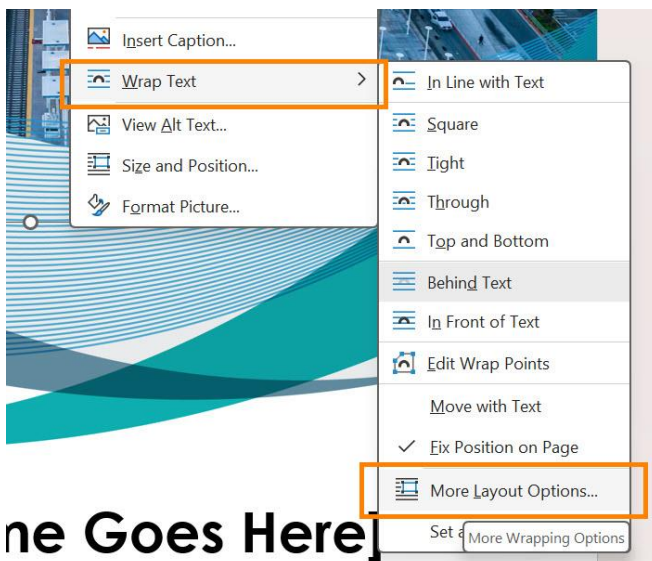
- Select the photo
- Right-click and select **View Alt-Text...**
- Type the alternative text in the field on the right side of the screen and then press **Tab** to set it



Adding Text Wrap

All existing placeholders have a text wrap assigned. If new photos/graphics are brought into the document or the text wrap is removed when the photos is replaced, add the text wrap back:

- Right-click the photo/graphic and select **Wrap Text > More Layout Options**
- Under **More Layout Options**, select the **Text Wrapping** tab
- Ensure **Square** is selected under **Wrapping Style** and then add a 0.2" wrap to all sides



Other Areas to Adjust

Cover Information

There are several placeholders on the cover for information. Ensure the following information is updated:

- **Logos:** Add logos for each of the nominating agencies
- **Month 20XX:** Add the correct month/year for the submission date
- **Project Title:** Add the project title, using heading level 1
- **Nominating Agencies:** The California Department of Transportation is already listed. Ensure that any other nominating agency is listed here as well.
- **Photos:** Replace these placeholder photos with graphics relevant to the project

Table of Contents

The Table of Contents is set up to automatically bring in specific heading levels. This is another reason why it is imperative to use appropriate heading levels throughout the document. To update the table of contents:

- Click on the table anywhere
- An option will appear towards the top of the table, **Update Table**. Select this option to update the entire table.



ACCESSIBILITY REVIEW CHECKLIST

Accessibility starts with a properly formatted document. Use the checklist below to ensure the application follows accessibility guidelines.

Font Style and Size

- ☐ **Font:** Century Gothic
- ☐ **Size:** 10-pt body; 8-pt tables & footnotes

Document Properties

- ☐ **Title:** The title of the document
- ☐ **Subject:** Brief description of the document's subject
- ☐ **Tags/Keywords:** Words associated with the document during a search; words that will effectively rank the document for relevance
- ☐ **Author:** The Program Division, District, or Owner

Titles and Headings

- ☐ Use style elements to indicate hierarchical level of a title or heading (i.e. H1, H2, H3)

Paragraph Spacing

- ☐ Use paragraph spacing between paragraphs, not hard returns.
 - If Styles / Paragraph Styles are used correctly, paragraph spacing is already built in.

Alternative Text (Alt-Text)

- ☐ Provide alternative text (alt-text) for all meaningful images, charts, maps, and diagrams.
- ☐ Mark decorative images, watermarks, and background images as "decorative" or artifact.

- ☐ Provide alt-text for hyperlinks; include the title / name of the landing page, website, or email

Hyperlinks

- ☐ All hyperlinks should be active and go to the correct location when clicked
- ☐ Include descriptive link text (e.g. Caltrans ADA Resources) instead of a raw URL.

Text Color

- ☐ Include other visual, non-color dependent text styling (e.g. **bold**, *italics*, underline) for persons with color vision deficiency

Tables

- ☐ Keep tables simple
- ☐ Only use one row in the header
- ☐ Never merge or split cells
- ☐ Do not leave any cells, rows, or columns blank
- ☐ Add table summary

Scanned Documents – Do Not Include

- ☐ Do **not** include scanned pages or scanned PDFs in the application package
- ☐ If a document is scanned, it must undergo Optical Character Recognition (OCR) and full remediation to ensure machine readability.