

REGIONAL CRITERIA FOR THE ATLANTA 10-COUNTY SPECIAL TAX DISTRICT

- These Regional Criteria for development of an investment list of projects and programs were developed based on the Final Recommended Criteria from the GDOT Director of Planning, 11/8/10, and refined by Roundtable Members during recent Conference Calls. Content changes are underscored.
- The Regional Criteria do not apply to the 15% Local Share to be distributed by formula to cities and counties.

Framework for the Atlanta Region Investment Criteria

Definitions:

- Unconstrained Example Investment List – an example list of projects that comport with approved criteria developed by the Director of Planning; list does not have to be fiscally constrained.
- Constrained *Draft* Investment List – developed from the Unconstrained Example Investment List by the Roundtable’s Executive Committee in collaboration with the Director of Planning; list is fiscally constrained by the projected revenue of a 10-year sales tax.
- Constrained *Final* investment List – developed from the Constrained *Draft* Investment List (and amended with projects from the Unconstrained Example Investment List, if needed) by the Roundtable and approved; list is fiscally constrained by the projected revenue of a 10-year sales tax and deliverable within the 10 year timeframe.
- Discretionary Funds- 15% of all revenue collected by the sales tax will be redistributed to the counties and cities within the region using the LARP factor (a combination of population and lane miles). Each jurisdiction will determine how to spend these dollars. Projects are not subject to the criteria or the Roundtable’s approval. However, these projects will play an important role in the public’s approval of a regional sales tax.

Process:

- After the criteria are approved by the Roundtable, the Director of Planning, in collaboration with ARC and local jurisdictions, will develop the Unconstrained Example Investment List by evaluating the extent to which submitted projects satisfy the approved screening criteria.
- Projects that meet the criteria, align with the SSTP and PLAN 2040, area currently listed I an approved plan and can be delivered within the timeframe of the regional sales tax will be eligible for inclusion on the Unconstrained Example Investment List.
- Next, the Director of Planning will determine the specific public benefits to be expected upon the completion of each project on the Unconstrained Example Investment List and asses how each project furthers the goals of the Atlanta region’s investment criteria. A number of performance

measures will be used to evaluate each project's contribution. Metrics from the Statewide Strategic Transportation Plan and Plan 2040 will be used to determine the public benefit for each project. The performance measures and public benefits will be provided along with the Unconstrained Example Investment List to the Roundtable and the Executive Committee. These are intended to assist the Executive Committee and the Roundtable in selecting the best projects and provide the region's citizens a solid evaluation of the use of their sales tax dollars.

- The Executive Committee in collaboration with the Director of Planning will use all this information and extensive public feedback to create the Constrained Draft Investment List from the Unconstrained Example Investment List (due to the Roundtable no later than August 15, 2011). The law only requires two public hearings, but it is the intention of the Atlanta Roundtable to do extensive public outreach including polling and public forums throughout this process.
- The Roundtable may also use this information to amend the Constrained Draft Investment List with projects from the Unconstrained Example Investment List to create the Final Investment List (Roundtable must approve by October 15, 2011).
- Finally, if the regional sales tax referendum is approved by the voters of a special district, the Director of Planning will track and report on the funding, execution, and performance of the projects in the district's Constrained Final Investment List.

Final Recommended Criteria for the Atlanta 10-County Special Tax District

- I. The project list should support the **performance goals** of the Statewide Strategic Transportation Plan:
 - Support Georgia’s economic growth and competitiveness.
 - Ensure safety and security.
 - Maximize the value of Georgia’s assets, getting the most out of the existing network.
 - Minimize the impact on the environment.

- II. The project list should achieve the following **outcomes**:
 - Achieve the best value for taxpayers' dollars and improve the region’s transportation network.
 - Transportation projects¹ delivered on time and on budget.
 - Public support for projects funded by the regional sales tax and public trust that state and local governments will deliver on their promises.
 - Investments should improve regional mobility.

- III. The project list development should be guided by the following **principles**:
 - Investment list is developed with a focus on deliverability.
 - Projects should come from existing plans and/or studies (for example, the GDOT work program, ARC long range plan and short range program, ARC Congestion Management Process, county transportation studies, etc.).
 - Investment list is consistent with the policies of the SSTP and policies of the Atlanta Region’s PLAN 2040.
 - Investment list encourages effective multimodal solutions that appeal to a broad spectrum of the region’s citizens and address the region’s rapidly growing older adult population.

¹ “Project” means, without limitation, any new or existing airports, bike lanes, bridges, bus and rail mass transit systems, freight and passenger rail, pedestrian facilities, ports, roads, terminals, and all activities and structures useful and incident to providing, operating, and maintaining the same. The term shall also include direct appropriations to a local government for the purpose of serving as a local match for state or federal funding.

- The project list should demonstrate regional equity in order to ensure it attracts the support of voters from the entire region. Regional equity will be measured by the outcomes of specific projects not the dollar amounts spent on projects in specific jurisdictions.
- Both the unconstrained and final list of projects may include “packaged projects” that address connectivity issues for the regional transportation network. These projects can include, but are not limited to, last mile connectivity, bicycle, pedestrian safety and capital resurfacing and rehabilitation projects.
- The criteria are designed to create a list of projects that have public support, can be delivered, and produce results for the citizens. The criteria are intended to be interpreted with enough flexibility to achieve these objectives and to create an overall list that is supported by the roundtable and the citizens of the region.

IV. Projects will be evaluated by the following **criteria**:

a. Applicable to All Program Areas

- i. Emphasis will be on the construction phase or acquisition of capital equipment; however project phases other than construction can be included in the Unconstrained Example Investment List. Preference will be given for preliminary engineering, right-of-way, and environmental reviews which ultimately deliver a construction project within the 10-year sales tax period.
- ii. Each project phase included in the investment list, and each phase necessary to complete the same, regardless of funding source, must demonstrate full funding. For projects with preliminary engineering and/or right-of-way funded by Transportation Investment Act revenue, construction funds must be shown in the Atlanta region’s long range transportation plan adopted by ARC.
- iii. Emphasis will be on delivery. All project phases funded with Transportation Investment Act revenue should be able to be completed or underway within ten years. The Director of Planning recommends that approximately 40% of the total expected Transportation Investment Act funding should be allocated to project phases that could be completed or underway within six years of the start of the regional sales tax, and the remaining funds should be allocated to projects that could be completed or underway within ten years of the start of the regional sales tax. (Excludes 15% discretionary local share to be distributed by formula to cities and counties.)

b. Roadway Capital

The projects that qualify under “roadway capital” serve origins or destinations of trips to/from and within major existing and proposed employment and activity centers throughout the region.² Qualified roadway capital projects should improve the most congested regional corridors as determined through ARC’s Congestion Management Process, Regional Strategic Transportation System and Regional Thoroughfare Network. These projects could be new roads, roadway widenings, interchanges, interstate improvements, bridges, etc.

c. Roadway and Bridge Maintenance (asset management)

- i. Priority for resurfacing/rehabilitation needs are for facilities on the Regional Strategic Transportation System developed by the ARC, with emphasis on connecting major regional employment or activity centers. Priority will be based on risk and on PACES ratings provided by GDOT. (Note: Off-system resurfacing should be pursued using the 15% discretionary share.)
- ii. Bridge maintenance and replacement shall be determined based on ratings provided by GDOT.

d. Safety and Traffic Operations

- i. Safety
 - a) Projects that align with the key emphasis areas of the Governor’s Strategic Highway Safety Plan (SHSP).
 - b) Priority is given to projects that correct or improve a road location or feature with high potential for safety improvement, or addresses a specific highway safety deficiency. The objective of each project must be to reduce fatalities and serious injuries.
 - c) Projects may include intersection improvements to address safety concerns, shoulder widenings, pedestrian/bicycle safety improvements, hazard eliminations at rail-roadway crossings, traffic calming measures, installation of guardrails, crash attenuators, traffic signal upgrades, signage, and pavement marking improvement projects, etc.
- ii. Traffic Operations
 - a) Projects that improve or enhance the region’s intelligent transportation system network, incident management program, or signal coordination and timing.
 - b) Projects addressing an existing operational issue resulting in an improved level of service or reduction in delay or other congestion costs.

² Major regional employment and activity centers are Region Centers and Regional Town Centers as defined in ARC’s PLAN 2040 Regional Development Guide.

e. Freight and Logistics

- i. Projects that address the demand for goods movement into, out of, and within the state as identified through the Statewide Freight and Logistics Study (ongoing), the Atlanta Regional Freight Mobility Plan and the Atlanta Strategic Truck Route Master Plan adopted by the ARC.
- ii. Projects that enhance the flow of freight transported by trucks and/or rail.
- iii. Projects that facilitate the transfer of freight between modes.

f. Aviation

- i. Projects at new or existing airports that are contained in the airport's 5-year Airport Capital Improvement Program submitted annually to GDOT and FAA. The types of projects included in this area are runways, taxiways, aprons, and navigational aids.
- ii. Projects consistent with the goals and objectives of Georgia's Statewide Aviation System Plan.

g. Bicycle and Pedestrian

- i. Projects consistent with the Atlanta Region's Bicycle and Pedestrian Plan.
- ii. Projects that provide connectivity to/from or within a major regional employment or activity center.
- iii. Projects that provide connection to/from existing or planned transit including bus stops and multi-modal centers.

(Note: Projects such as landscaping and recreational paths should be pursued using the 15% discretionary share.)

h. Transit³ Capital

- i. To comply with the Transportation Investment Act Section 7, the highest consideration will be given to the projects that are most highly prioritized by ARC (in conjunction with the Director of Planning and GRTA) per economic benefit, lowest environmental impact, and completion of environmental permitting (O.C.G.A. 50-32-5 (f)). Capital expenditures may include new, systematic replacement, upgrades, refurbishment, and other capital project expenditures.
- ii. New fixed guideway facilities should also include a 20-year operating plan. Funds for the operations may come from any identified source including Transportation Investment Act transit operation funds and its authorized reserves under O.C.G.A. 48-8-241(c).
- iii. Transit projects should be part of an existing system or have independent utility.

³ Transit means any new or existing bus and rail mass transit systems, passenger rail, and all activities and structures useful and incident to providing, operating, and maintaining the same.

- iv. Transit service for the proposed project should satisfy at least two of following:
 - a) cross a county border;
 - b) directly serve a major regional employment or activity center;
 - c) carry a forecasted average 4,000 weekday boardings upon opening; and/or
 - d) connect to an existing or under construction fixed guideway facility as defined by FTA.
- v. Transit projects should serve areas with land use ordinances that enable increased development densities around stops and stations.

i. Transit Operations and Maintenance

Any funding must first preserve the existing regional transit service. After the existing service is addressed, operations and maintenance funding from the regional sales tax would then be allocated to new transit projects. Existing regional service is defined as the transit service in operation in the Atlanta Region as of January 1, 2011 (consistent with the Transportation Investment Act or any amendments) that satisfies at least two of following: (1) crosses a county border; (2) directly serves a major regional employment or activity center; (3) carries an average of 4,000 weekday boardings; and/or (4) connects to an existing or under construction fixed guideway facility as defined by FTA.

APPENDIX A: Illustrative Investment Guidelines

The table below serves only as a guide as to how investments can be allocated to meet the goals of the Statewide Strategic Transportation Plan:

Program Areas	Investment Guidelines (%)	Illustrative Estimate Over 10 Years Based on Draft Economic Projections⁴, (\$)
Roadway Capital	20% - 50%	\$1.5 - \$3.7 Billion
Roadway & Bridge Maintenance (Asset Management)	0% - 10%	\$0 - \$740 Million
Safety and Traffic Operations	5% - 15%	\$37 Million - \$1.1 Billion
Freight & Logistics	0% - 5%	\$0 - \$370 Million
Aviation	0% - 5%	\$0 - \$370 Million
Bicycle and Pedestrian	1% - 5%	\$74 - \$370 Million
Transit Capital	10% - 40%	\$74 Million - \$3.0 Billion
Transit Operations & Maintenance	5% - 20%	\$37 Million - \$1.5 Billion

⁴ These numbers may change based on the final projections to be provided by the State Economist.