

## Final Criteria for the Middle Georgia Special Tax District (as adopted January 18, 2011)

*Final recommended criteria for the development of an investment list of projects and programs, excluding 25% local share to be distributed by formula to cities and counties.*

The following performance goals, desired outcomes, guiding principles, and framework guided the design of the final recommended criteria, as well as comments received from counties, cities, MPOs, and others following their review of the draft recommended criteria:

### **Performance Goals as Adopted in the Statewide Strategic Transportation Plan (SSTP)**

- 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.

### **Outcomes**

- Strategic use of funds to achieve the best value for taxpayers' dollars and improvement of the region's transportation network.
- Transportation projects<sup>1</sup> 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.

### **Guiding Principles**

- Investment list is developed with a focus on deliverability.
- Projects are from existing plans and/or studies (for example, the DOT work program, MPO long-range plan and short-range program, county transportation studies, etc.).
- Investment list is consistent with the policies of the SSTP and the MPO's plan if applicable.
- Investment list encourages effective multimodal solutions that appeal to a broad spectrum of the region's citizens.

---

<sup>1</sup> "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.

## Framework for Investment Criteria

### Definitions:

- Unconstrained Example Investment List - developed by the Director of Planning with input from local governments and the MPOs in the region.
- Constrained *Draft* Investment List - developed from the Unconstrained Example Investment List by the Roundtable's Executive Committee in collaboration with the Director of Planning.
- 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.

### Process:

The Constrained Final Investment List of projects to be funded by the Transportation Investment Act's regional transportation sales tax referendum will be developed by first setting investment allocation target ranges for each program area (see #1 on page 3) based on the SSTP and the MPO long range plan, if applicable. These will be used to limit the Unconstrained Example Investment List for each program area within the revenue expected to be available. Next, projects being considered for support by the Transportation Investment Act revenue will be evaluated using qualitative screening criteria (see #2 on page 3) designed to allow further consideration of projects that align with the SSTP and MPO plans (if applicable) and can be delivered within the timeframe of the regional sales tax.

The Transportation Investment Act also requires that the criteria include performance goals and that projects on the investment list include a "statement of expected public benefits." The performance goals were established by the SSTP and are listed on the prior page. A number of performance measures will be used to evaluate each project's contribution toward achieving these goals. Performance measures and public benefits analysis are inter-related and become one of the many tools to assist the Director of Planning to formulate the Unconstrained Example Investment List. The performance measures and public benefits will be provided along with the Unconstrained Example Investment List at a later date. The types of metrics that will be used to determine the public benefit will come from the SSTP and MPO plans, if applicable. Ultimately, they are intended to assist the Roundtable in selecting the best projects and to allow the region's citizens a solid evaluation of the use of their sales tax dollars.

After the criteria are approved by the Roundtable, the Director of Planning, in collaboration with the MPO and local jurisdictions, as applicable, will develop the Unconstrained Example Investment List in part by evaluating the extent to which submitted projects satisfy the approved screening criteria. Next, the Director of Planning will determine the specific public benefits to be expected upon the completion of each project included in the Unconstrained

Example Investment List and how the special district's investment criteria are furthered. This information along with the approved investment allocation target ranges will be used by the Executive Committee of the Roundtable in collaboration with the Director of Planning to create the Constrained Draft Investment List from the Unconstrained Example Investment List. 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. 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.

**1. Final Recommended Investment Allocation Target Ranges**

- a. Investment allocation target ranges (for the 10-year period) for program areas will support implementation of the SSTP and MPO plan, if applicable.
- b. Program areas and allocation target ranges:

<b>Program Areas</b>	<b>Investment Allocation Target Ranges (%)</b>	<b>Illustrative Estimate Over Ten Years Based on Draft Economic Projections<sup>2</sup> (\$)</b>
Roadway Capital; Road and Bridge Maintenance (Asset Management)	50-80%	\$403 - \$646 million
Safety and Traffic Operations	15-50%	\$120 - \$403 Million
Freight and Logistics; Aviation	5-20%	\$40 - \$161 Million
Bicycle/ Pedestrian	1-5%	\$8 - \$40 Million
Transit Operations, Maintenance and Capital	5-20%	\$40 - \$161 Million

<sup>2</sup>These numbers may change based on the final projections to be provided by the State Economist- based on \$807 million projected over 10 years.

## **2. Final Recommended Screening Criteria by Program Area**

### **a. Applicable to All Program Areas**

- i. Projects must be from plans and/or studies (for example, the GDOT work program, MPO long-range plan and short-range transportation program, county transportation studies, etc.) and needs as assessed by local governments and the Regional Roundtable.
- ii. 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 ten-year sales tax period.
- iii. Each project phase included in the investment list, and each phase necessary to complete the same, regardless of funding source, must demonstrate full funding.
- iv. 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 25% 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 employment and activity centers throughout the region<sup>3</sup>. These projects could be new roads, roadway widening, interchanges, interstate improvements, bridges, economic development corridors, etc.

### **c. Roadway and Bridge Maintenance (asset management)**

- i. Priority for resurfacing/rehabilitation needs is on state routes or routes that are considered regionally significant as defined by roads that connect major regional employment or activity centers. Priority will be based on risk, on PACES ratings provided by GDOT or upon request by local elected officials.
- ii. Bridge maintenance and replacement shall be determined based on ratings provided by GDOT and / or other ratings.

---

<sup>3</sup>Major regional employment and activity centers may be identified at the sole discretion of the Roundtables.

**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.

**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).
- ii. Projects that enhance the flow of freight transported by trucks and/or rail.
- iii. Projects that facilitate the transfer of freight between modes. In particular, projects that improve the flow of freight into/out of Georgia's existing ports.

**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 a 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 multimodal centers. (Note: Projects such as landscaping and recreational paths should be pursued using the 25% discretionary share.)

**h. Transit<sup>4</sup> Capital**

- i. 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 service for the proposed project should ultimately connect to employment centers or activity centers in the region and provide increased mobility for individuals.

**i. Transit Operations and Maintenance**

Any funding must first serve to enhance the existing local or regional transit service in operation as of January 1, 2011. After the existing service is addressed, operations and maintenance funding from the regional sales tax would then be allocated to new transit projects.

---

<sup>4</sup>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.