

## **FINAL RECOMMENDED CRITERIA FOR THE CENTRAL SAVANNAH RIVER AREA SPECIAL TAX DISTRICT**

*Final Recommended Criteria for the Development of an Investment List of Projects and Programs. Excludes 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.
- Focusing on deliverability, projects from existing plans and/or studies (for example, the GDOT work program, MPO long range plan and short range transportation improvement program, county transportation studies, etc.) will be given preferential review by the Executive Committee and the Regional Transportation Roundtable.

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<sup>1</sup> Pursuant to the Official Code of Georgia Annotated (OCGA) 48-8-242 (10), "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."

- Projects not already in existing plans and/or studies may be considered, but sufficient data related to project feasibility, deliverability, and estimated cost should be included with the nomination for such projects.
- For regionally selected projects specifically on the Statewide Strategic Transportation Plan (SSTP) or the Metropolitan Planning Organization's long range transportation plan, such projects should be consistent with the long-term planning documents.
- Investment list encourages effective multimodal solutions that appeal to a broad spectrum of the region's citizens.

## FRAMEWORK FOR INVESTMENT CRITERIA

### Definitions:

- **Unconstrained Example Investment list** - developed by the GDOT Director of Planning
- **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.
- **Discretionary Funds**- 25% of all revenue collected by the sales tax will be redistributed to the counties and cities within the region using the LARP factor formula contained in House Bill 277. Each jurisdiction will determine how to spend these dollars locally. These discretionary local projects are not subject to the criteria or the Roundtable's approval, and can be used pursuant to O.C.G.A. 48-8-242(10)<sup>2</sup>. These projects will play an important role in the public's approval of a regional sales tax.

### Process:

The following process will be used to develop the project list to be presented to the voters for approval:

1. The Regional Transportation Roundtable will approve the criteria to be used in developing the Constrained Final Investment list of projects to be funded by the Transportation Investment Act's regional transportation sales tax referendum.
2. After the criteria are approved by the Roundtable, the Director of Planning, in collaboration with the CSRA Regional Commission, the Technical Advisory Committee, and local jurisdictions, will develop the Unconstrained Example Investment List by evaluating the extent to which submitted projects satisfy the approved screening criteria<sup>3</sup>.

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<sup>2</sup> See Footnote Number 1.

<sup>3</sup> This does not imply that any of the bodies will be required to approve the unconstrained list. Pursuant to OCGA 48-8-243(b), the Georgia DOT Planning Director has sole authority "...to assemble a list of example investments for such special district that comport with the special district's investment criteria."

3. Projects that meet the criteria, align with the Statewide Strategic Transportation Plan, are currently listed in existing planning documents and can be delivered within the timeframe of the regional sales tax period will be automatically eligible for inclusion on the Unconstrained Example Investment List.
4. Projects that meet the criteria, align with the Statewide Strategic Transportation Plan, but are not currently listed in existing planning documents may be submitted for review, but should include sufficient documentation to allow the Director of Planning, the RTR, the Executive Committee, the MPO, and the Regional Commission to ascertain the feasibility of being delivered within the timeframe of the regional sales tax period to be eligible for inclusion on the Unconstrained Example Investment List.
5. Projects being considered for support by the Transportation Investment Act revenue will be evaluated using qualitative screening criteria (see #2 below) 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.
6. The Transportation Investment Act requires that the criteria include performance goals and that projects on the investment list include a "statement of expected public benefits." 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.
7. The Director of Planning, in collaboration with the MPO, the Regional Commission, 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.
8. 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 any approved investment allocation target ranges, will be used by the Executive Committee of the Roundtable, in collaboration with the Director of Planning and the Regional Commission and MPO 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 recommended by the Executive Committee with projects originally submitted on the Unconstrained Example Investment list provided by the Director of Planning to create the Final Investment list.

If the regional sales tax referendum is approved by the voters of the 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.

## **INVESTMENT LIST CRITERIA**

### **1. Final Recommended Investment Allocation Target Ranges (excludes discretionary funds)**

a. Investment allocation target ranges (for the 10-year period) for program areas will support implementation of the SSTP and MPO plan, if applicable. The final investment list may include projects that do not adhere to these draft target ranges.

b. Program areas and allocation target ranges:

<b>Program Areas</b>	<b>Investment Allocation Target Ranges (%)</b>	<b>Illustrative Estimate Over 10 Years Based on Draft Economic Projections<sup>4</sup> (\$)</b>
Roadway Capital	50% - 70%	\$320 - \$440 Million
Roadway & Bridge Maintenance (Asset Management)	0% - 10%	\$0 - \$63 Million
Safety and Traffic Operations	15% - 50%	\$95 - \$320 Million
Freight & Logistics	2% - 10%	\$13 - 63 Million
Aviation	0% - 5%	\$0 - \$32 Million
Bicycle and Pedestrian	1% - 5%	\$6.3 - \$32 Million
Transit Capital	0% - 10%	\$0 - \$63 Million
Transit Operations & Maintenance	0% - 10%	\$0 - \$63 Million

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

a. Applicable to All Program Areas

- i. Projects should be from existing plans and/or studies (for example, the GDOT work program, MPO long range plan and short range transportation improvement program, county transportation studies, etc.). Projects not already on existing plans and/or studies may be considered, but sufficient data related to project feasibility,

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

deliverability, and estimated cost should be included with the nomination for such projects<sup>5</sup>.

- 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 10-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>6</sup>. These projects could be new roads, roadway widenings, 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 and on PACES ratings provided by GDOT. (Note: Off-system resurfacing should be pursued using the 25% discretionary share.)
- ii. Bridge maintenance and replacement shall be determined based on ratings provided by GDOT.

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<sup>5</sup> Sufficient documentation related to project feasibility, deliverability, and estimated cost does not necessarily require the inclusion of preliminary engineering reports. Note, however, that preferential review of project submissions with more detailed data will be done before reviewing potential projects with little or no supporting documentation.

<sup>6</sup> Major regional employment and activity centers may be identified at the 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, sign age, 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 multi-modal centers.

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

**h. Transit<sup>7</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.

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<sup>7</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.