

## **Local Board Transport Capital Fund (LBTCF) – Criteria & Guidelines**

### **Criteria (As per original Strategy & Finance resolutions)**

1. Project is a CAPEX project that creates a physical transport asset? Yes/No
2. Project does not compromise safety? Yes/No
3. Project does not compromise network efficiency? Yes/No

A 'No' for any of these means the project cannot proceed.

### **Discussion**

The criteria above need to be satisfied before a project can even be considered under the rules governing this fund.

The LBTCF Guidelines below are designed to assist local boards in comparing different proposals to determine the best projects from each local board's perspective.

The attached score sheet is designed for the use of local boards when considering transport projects and its purpose is to assist local boards in evaluating different projects against a common set of value propositions. These guidelines are not intended to be Auckland Transport (AT) focused, although they will form the basis of advice from AT's Elected Member Relationship Managers. This advice will be aimed at assisting local boards in determining the best projects to undertake in their communities.

### **Guidelines**

#### **A. Does the project align with one of your Local Board Plan strategic outcomes?**

The intention here is to encourage local boards to undertake projects that they have either explicitly consulted on, or that contribute towards the outcomes detailed in their Local Board Plans. The scoring sheet gives a score of 3 if the project does but nothing if the project doesn't.

#### **B. Does the project benefit the overall transport network by creating new links and/or facilities?**

The LBTCF is designed to deliver transport outcomes. ie. Improve people's ability to get around the city or provided added benefits to them as they travel. (Seats, short-cuts, water fountains, etc.) This guideline is around maximising the benefits generated by the use of the fund. For this guideline the score sheet is designed to reflect the relative value of the project in creating new links and/or facilities.

#### **C. How many people will it benefit?**

What proportion of the community will or might benefit from this project? Obviously very few projects will benefit an entire community but some thinking around the numbers and/or percentages should ensure that the project is seen as worthwhile by as many as possible. Again the score sheet is designed to weight the project in terms of the relative numbers of the community who will benefit. However, this might be a large proportion of a small community and as such, quite a small number of the LB's overall population.

**D. Are the people who will benefit the; very young, elderly or mobility impaired, members of the community?**

Some members of the community are less experienced, confident or able, in terms of getting around the transport system. (Roads, footpaths, cycleways, rail & bus stations, etc.) Does this project take these members of the community into account and make it easier or safer for them to travel around? This guideline adds further weight to the numbers benefiting by adding in members of the community who will find the project particularly valuable.

**E. Considering costs versus benefits gained, does this project represent good value for your LB?**

In a sense this guideline echoes C & D above but poses the question as to whether the cost of the project, the benefits and the percentage impact of the board's overall fund, represent good value outcomes for the money spent? Here the score sheet simply allows a higher score for projects seen as representing good value outcomes.

**F. How much is this project adding value by augmenting a project Auckland Transport (AT) is currently doing or about to do?**

An add-on to an existing AT project will tend to be much more cost effective because many of the costs for basic project requirements such as traffic management and work site establishment, will have already been covered by the AT project. This means that less of the board's money will be required to establish the particular facility the board is wanting. The score for this guideline simply represents the efficiency of delivery.

**G. How likely is this project to attract additional funding from AT, AC or other parties?**

Some projects more naturally aligned with projects AT, Auckland Council or other parties are looking to undertake. If this is the case, these parties may well be prepared to contribute significant portions of a project budget. There is however, a potential danger in that the other parties will be looking for specific outcomes and these may not always align perfectly with the LB's. The scoring here is designed to maximise the value of the LBTCF by leveraging other money into the project. A yes/no, question.

**H. Is this project identified in the Regional Land transport Plan (RLTP)?**

If the project is specifically documented in the RLTP then by definition it is a strategic transport project. This clearly enhances its overall value as a transport project. However, a local board wanting to bring forward a project in the RLTP needs to be able to fund the entire project, or at least a fully standalone part of the project. (The standalone part would need to deliver the necessary value without the rest of the project being built.) Again the scoring for this is a yes/no question but the weighting of a 'Yes' could be varied.

**I. If it is in RLTP, when is it scheduled for implementation?**

This guideline focuses on the scheduled timing of the project, if it is detailed in the RLTP. The sooner it is scheduled in the RLTP the less value the LB gains from the

project because AT will be doing the project anyway in the near future. However, if the project is 5 or more years away the LB could get considerable positive feedback for making something happen that the community have been wanting and perhaps expecting, for some time. The score sheet for this guideline, scores strategic projects that are being brought forward a substantial amount, highly and, projects that AT will undertake anyway in the near future, as zero or very low.

#### J. Consequential OPEX

Assets that require significant on-going OPEX to maintain represent a major additional cost over and above the initial project build cost and this needs to be factored into the decision making process.

### **LBTCF – Guidelines for comparative evaluation of projects**

#### **Guidelines/Considerations**

	<b><u>How worthwhile is this project when everything is taken into account?</u></b>	<b><u>Score</u></b>
A.	Does the project align with one of your Local Board Plan strategic outcomes? (No = 0, Yes = 3)	
B.	Does the project benefit the overall transport network by creating new links and/or facilities? (A little = 1, A lot = 5)	
C.	How many people will the project benefit? (A few local residents = 1, Many members of the community = 5)	
D.	Are the people who will benefit from the project the; very young, elderly or mobility impaired? (No = 0, A few = 1, Many = 3)	
E.	Considering costs versus benefits gained, does this project represent good value for your LB? (Low value = 1, High value = 3)	
F.	How much is this project adding value by augmenting a project AT is currently doing or about to do? (Nil = 0, High = 3)	
G.	How likely is this project to attract additional funding from AT, AC or other parties? (Nil = 0, High = 3)	
H.	Is this project identified in the RLTP? (Regional Land Transport Plan) (? (No = 0, Yes, therefore has strategic fit = 3)	
I.	If it is in RLTP, when is it scheduled for implementation? (Months = 0, In 1-2 years = 1, In 3-4 years = 2, In 5 plus years = 3)	
J.	Consequential OPEX (High = 0, Low = 2, Very Low = 3 [Eg. Concrete footpath])	
	<b>TOTAL SCORE</b>	

NB: This scoresheet is a comparative tool and is designed for evaluating projects against each other, based on the factors considered important by each local board and its community. The scores above are intended as a starting point and should be altered as required.