



Joint Development Project Request Form

Please submit this form and relevant documentation to your [FTA Regional Office](#).

For FTA's guidance on joint development, please visit www.transit.dot.gov/JointDevelopment.

Section 1: Overview

Preliminary Request OR Final Request

| | | | |
|--|--|---------------------------|--|
| Project Title | | FTA Region | |
| Project Street Address | | Project Location City | |
| Project Location State | | Project Location Zip Code | |
| Parcel number(s) of FTA-assisted real property | | | |

| | | | |
|--|--|-------------------------|--|
| Sponsor Organization <i>(FTA Recipient)</i> | | Date of Form Submission | |
| Contact Name | | Phone Number | |
| Contact Job Title | | Email Address | |

Project Summary (1-2 paragraphs)

Section 2: Project Details

Partner Organizations

(e.g., a developer, nonprofit, etc. constructing a building on the property, leasing the property, etc.)

| | | | |
|-------------------|--|------|--|
| Organization Name | | Role | |
| Organization Name | | Role | |
| Organization Name | | Role | |

Source(s) of FTA funds for asset(s) contributed to the project:

- Section 5307
- Section 5309
- Section 5310
- Section 5311
- Section 5337
- Section 5339
- FHWA Flexible Funds
- Other: _____

| | |
|---|--|
| Is the source of FTA funds a new or existing grant? If an existing grant, what is the grant number? | |
| Is this joint development project part of a new grant/transit project? (If no, disregard further questions in this section) | |
| What is the estimated total cost of the transit portion of the project? | |
| What is the estimated total cost of the non-transit portion of the joint development project? | |
| What is the amount of the original Federal investment (in funds or assets) contributed to the non-transit portion of the joint development project (in year of expenditure U.S. dollars)? | |

Section 3: Eligibility Requirements

For more information on Eligibility Criteria, see [FTA Circular 7050.1C](#), Chapter III.

Criteria 1: Economic Benefit

The economic benefit criterion can be met by satisfying one of the following:

- 1) Enhancing economic development OR
- 2) Incorporating private investment

Option 1: The joint development project enhances economic development.

How does the joint development project contribute to privately or publicly funded economic development activity occurring close to the transit facility or provide other economic benefits?
(For example, if the project is expected to create jobs, specify how and provide an estimate. If the project will build new housing or commercial space, specify how that will improvement located near a transit facility will create economic benefits.)

OR

Option 2: The joint development project incorporates private investment.

What is the form, source, and timing of the private investment?

What is the value of the private investment (in U.S. dollars)?

Criteria 2: Public Transportation Benefit

The public transportation benefit criterion can be met by satisfying one of the following:

- 1) Enhancing the effectiveness of a public transportation project *and* relating physically or functionally to the public transportation project OR
- 2) Establishing new or enhanced coordination between public transportation and other transportation.

Option 1: The joint development project enhances the effectiveness of a public transportation project *and* relates physically or functionally to the public transportation project.

How will the joint development project enhance the effectiveness of public transportation?

(For example, provide a reasonable demonstration of the project's forecasted transit benefits, which may include increased ridership, travel time savings, enhanced wayfinding, improved transit access, or increased mobility.)

How is the joint development project physically or functionally related to the public transportation project?

OR

Option 2: The joint development project establishes new or enhanced coordination between public transportation and other transportation.

How does the project establish new or enhanced coordination between public transportation and another mode of transportation?

(For example, provide a reasonable demonstration of the project's forecasted multi-modal coordination benefits, which may include shared stations, ticket counters, parking facilities, taxi bays, passenger drop-off points, or waiting areas; coordinated signage, schedules, or ticketing; or pedestrian or bike paths connecting transit to another mode.)

Criteria 3: Fair Share of Revenue

Satisfaction of this criterion is demonstrated through a contractual agreement whereby the project sponsor receives a fair share of the revenue generated by the joint development project. The amount of revenue received by the project sponsor, and what form it takes, shall be negotiated between the parties involved in the joint development. This revenue must be used for public transportation.

What is the form and source of the revenue to be received by the project sponsor? How is this demonstrated in the joint development agreement?

(For example, if the project involves a ground lease of FTA-assisted project property to a real estate developer, describe that here)

What are the terms and timing of the revenue to be received by the project sponsor? Is this included in the joint development agreement?

(For example, if the project involves a ground lease of FTA-assisted project property to a real estate developer, describe the duration of the lease, payment schedule, reassessments, specific conditions, etc.)

What is the actual or estimated amount of revenue to be received by the project sponsor cumulatively over the duration of the joint development agreement, excluding payments for shared costs for the operations and maintenance for the joint development facility (in U.S. dollars)?

Criteria 4: Fee Collection for Zero-Emission Vehicle Charging

This criterion is applicable only if FTA funds are used to construct, operate, or maintain equipment to fuel privately owned zero-emission passenger vehicles as part of a joint development improvement. If equipment to fuel zero-emission passenger vehicles is used primarily by privately-owned passenger vehicles, recipients must collect fees from users of the equipment in order to recover the costs of construction, maintenance, and operation of the equipment.

Satisfaction of this criterion is demonstrated through providing a copy of the fee collection arrangement with additional detail on the amount of recoverable costs and anticipated timeframe for recovery.

Fee collection may be waived if the equipment is not owned or operated by the recipient and/or the cost to install a fee collection system is more than the recipient anticipates collecting from users of the equipment. To demonstrate that the fee may be waived, recipients must submit an attestation by the recipient that it does not own/operate the equipment and/or the installation cost will exceed collections with supporting details.

Does this project use FTA funds to construct, operate, or maintain equipment to fuel privately owned zero-emission passenger vehicles?

Yes

No

If yes, will the recipient collect fees from users of the equipment?

- Yes , and the required documentation is attached.
- No, this requirement is waived because of the following reason(s) and the required documentation to support this waiver is attached:
 - The equipment is not owned or operated by the recipient.
 - The cost to install a fee collection system is more than the recipient anticipates collecting from users of the equipment.

Criteria 5: Fair Share of Costs

This criterion is applicable only if the project provides space within an FTA-assisted transit facility for the use of a tenant or for a non-transit purpose and the project sponsor bears the operating cost for that usage. For example, if the joint development includes the construction of a space for a privately-owned commercial purpose and the project sponsor pays for the utilities of the entire facility, including the commercial space.

Satisfaction is demonstrated through an agreement whereby the tenant of said space covers their fair share of the costs to improve, operate and maintain the space being used. The agreement should be included with this application.

Does the project provide space within an FTA-assisted transit facility for the use of a tenant or for a non-transit purpose?

- Yes No

If yes, please answer the following:

What is the type and purpose of all costs covered by the project sponsor for a tenant or non-transit purpose?

What is the value of the costs covered by the project sponsor for a tenant or non-transit purpose (in U.S. dollars)?

Section 4: Real Property Considerations

This section is only applicable if FTA funds are/were used in the acquisition of real property being used for the joint development project.

Are/were FTA funds used in the acquisition of real property being used for the joint development project?

- Yes No

If yes, please fill out the following questions:

Fair Market Value

What is the fair market value of the FTA-assisted real property contributed to the joint development project (in U.S. dollars)?

Please attach a valuation of the property. A simplified valuation is acceptable (e.g., market study of the fair market value of the property).

Satisfactory Continuing Control

What legal instrument will be used to convey or encumber the FTA-assisted real property for the joint development project, and to whom? Specifically, describe any interests in the property to be conveyed, including any encumbrance, easement, long-term ground lease, or similar interests, the means of conveyance, and elements of property identification or recordation.

How will the project sponsor maintain satisfactory continuing control of the FTA-assisted real property? Include examples of the terms and conditions in the proposed agreement to ensure the originally authorized transit purpose is protected. Attach a **draft** of the proposed agreement for legal review and concurrence.

Section 5: Documentation

Please confirm the documents below that are included with this application.

Required

- Property valuation
- Draft of proposed agreement showing the project sponsor will maintain satisfactory continuing control of the FTA-assisted real property, if applicable
- Fee collection arrangement for vehicle charging, if applicable

Optional

- | | |
|--|---|
| <input type="checkbox"/> Project narrative | <input type="checkbox"/> Site plan |
| <input type="checkbox"/> Board resolution/motion | <input type="checkbox"/> Job projection |
| <input type="checkbox"/> Ground lease appraisal | <input type="checkbox"/> Draft lease |
| <input type="checkbox"/> Useful life analysis | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |
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