



Board Report

File #: 2019-0210, **File Type:** Motion / Motion Response

Agenda Number: 36.

EXECUTIVE MANAGEMENT COMMITTEE APRIL 18, 2019

SUBJECT: CONGESTION PRICING FEASIBILITY STUDY UPDATE

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

CONSIDER:

- A. RECEIVING AND FILING the response to Motion 32.3 (Congestion Pricing) by Directors Garcetti, Kuehl, Butts, Solis, and Hahn; and
- B. APPROVING Next Steps for Congestion Pricing Feasibility Study, which includes:
 - May 2019: Staff will issue Requests for Proposals for 1) Technical Services (includes Equity Analysis) and 2) Communications Plan and Public Engagement Services;
 - Summer 2019: Seek Board authorization to award contract; and
 - Ongoing: Staff will conduct ongoing dialogue with the Board at key milestones during the project development process. An overview of the anticipated process is provided in Attachment E Project Milestones.

HAHN AMENDMENT

- Include a lane/different pricing model for the zero emission vehicles; and
- Include Board's ability to appoint the public partnership stakeholder panel and expand the number of the seats.

ISSUE

On February 28, 2019, the Board passed Motion 32.3 (Garcetti, Kuehl, Butts, Solis, and Hahn, Attachment A), which instructed staff to return to the Board with updates in their April report. This Motion was provided in response to staff's continuing response to Motion 4.1, directing the CEO to present a comprehensive funding plan for the "28 x 2028" initiative. The receive and file Board Report

portion is in response to instructions from the Board on the Transformational Initiatives, which include congestion pricing and New Mobility fees.

BACKGROUND

On February 28, 2019, the Board approved staff's recommendations to pursue the Transformational Initiatives that are central to "The Re-Imagining of LA County," which include congestion pricing and New Mobility fees. See Attachment B. These Transformational Initiatives address the widely shared desire to greatly reduce congestion, improve mobility and air quality, improve equity, and ultimately provide a more sustainable and resilient LA County for all.

In addition, the Board passed Motion 32.3 to direct staff to do the following:

- A. Move forward with a Congestion Pricing Feasibility Study entitled "The Re-Imagining of LA County"
- B. Ensure the Congestion Pricing Feasibility Study fully addresses and incorporates the parameters identified in the January 2019 Motions 43.1 (Butts) and 43.2 (Solis, Garcetti, Dupont-Walker, Butts, Hahn), which include, but are not limited to, a detailed implementation timeline, cost estimates, sources of funding, and an equity strategy execution plan;
- C. Move forward to explore fees for Transportation Network Company (TNC) trips in Los Angeles County; and
- D. Report back on the all the above at the April 2019 Board cycle.

DISCUSSION

Response to Motion 32.3, A-D:

- A. Move forward with a Congestion Pricing Feasibility Study entitled "The Re-Imagining of LA County":

There are multiple components to "The Re-Imagining of LA County," of which the Congestion Pricing Feasibility Study is one component. To avoid confusion with the initiative names and for clearer reference, the scope that will be undertaken for the Congestion Pricing Feasibility Study will be referenced here as "Congestion Pricing Feasibility Study." Staff will be procuring consultant services to assist us with the feasibility study. In May, staff will issue two requests for proposals: one for Technical Services and one for Communications and Public Engagement Services. The statements of work are included in Attachments C and D, respectively.

- B. Ensure the Congestion Pricing Feasibility Study fully addresses and incorporates the parameters identified in the January 2019 Motions 43.1 (Butts) and 43.2 (Solis, Garcetti, Dupont-Walker, Butts, Hahn), which include, but are not limited to, a detailed implementation timeline, cost estimates, sources of funding, and an equity strategy execution plan;

These components are included in the Technical Services statement of work (Attachment B), particularly under the following tasks:

- Task 4: Develop Equity Strategy
- Task 10: Develop Investment and Financial Plan

- Task 11: Develop Implementation Plan

- C. Move forward to explore fees for Transportation Network Company (TNC) trips in Los Angeles County; and

One of the first steps to explore fees for TNC trips is to better understand the effects and impacts of New Mobility services (private companies/operations) in Los Angeles County. Staff is identifying any existing research efforts that may be underway on this topic to avoid duplication of efforts, build off of existing work, and create cost efficiencies. Once that step is complete, staff will develop a scope of work to procure consultant services to provide the necessary assistance to explore fees on TNCs.

- D. Report back on the all the above at the April 2019 Board cycle.

This Receive and File report serves as a report back to the Board.

FINANCIAL IMPACT

The cost center manager will be responsible for budgeting the funds to conduct the full scope of the study.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

The proposed actions are fully consistent with Initiative 1.3 of the Metro Vision 2028 Plan to test and implement pricing strategies to reduce traffic congestion. Also, Initiative 1.3 commits to exploring opportunities for expanding access to shared, demand-responsive transportation options for everyone.

NEXT STEPS

Staff will issue Requests for Proposals for 1) Technical Services (includes Equity Analysis) and 2) Communications Plan and Public Engagement Services in May 2019 and will seek Board authorization to award contracts during Summer 2019. Staff will conduct ongoing dialogue with the Board at key milestones during the project development process. An overview of the anticipated process is provided in Attachment E Project Milestones.

ATTACHMENTS

Attachment A: Board Motion (File ID 2019-0109)

Attachment B: Board Report - The Re-Imagining of LA County: Mobility, Equity, and the Environment (File ID 2019-0105)

Attachment C: Statement of Work - Technical Services for Congestion Pricing Feasibility Study

Attachment D: Statement of Work - Communications and Public Engagement Services for Congestion Pricing Feasibility Study

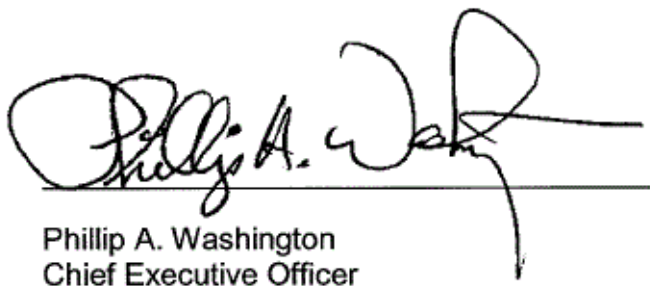
Attachment E: Project Milestones

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Board Report

File #: 2019-0109, **File Type:** Motion / Motion Response

Agenda Number: 32.3

REGULAR BOARD MEETING FEBRUARY 28, 2019

Motion by:

Garcetti, Kuehl, Butts, Solis and Hahn

Item 32.3: Congestion Pricing

As Los Angeles County continues to grow, the region should consider every strategy to provide accessible and affordable transportation for everyone. Congestion Pricing is a promising strategy to accomplish the region's mobility goals.

MTA must undertake a Congestion Pricing Feasibility Study that thoroughly and deliberately investigates all potential congestion pricing models and examines their effects on mobility, equity, and environmental sustainability, so that the Board has the information to make a fully informed decision.

Mobility and access to opportunity are fundamental to achieving social equity and fostering a thriving regional economy. It is important that MTA understand and prioritize the mobility benefits of congestion pricing and other traffic reduction strategies for our region. Accordingly, revenue generation should not be the primary reason to study congestion pricing.

SUBJECT: CONGESTION PRICING

APPROVE Motion by Garcetti, Kuehl, Butts, Solis and Hahn that the Board direct the CEO to:

- A. Move forward with a Congestion Pricing Feasibility Study entitled "The Re-Imagining of LA County";
- B. Ensure the Congestion Pricing Feasibility Study fully addresses and incorporates the parameters identified in the January 2019 Motions 43.1 (Butts) and 43.2 (Solis, Garcetti, Dupont-Walker, Butts, Hahn), which include, but are not limited to, a detailed implementation timeline, cost estimates, sources of funding, and an equity strategy execution plan;
- C. Move forward to explore fees for Transportation Network Company (TNC) trips in Los Angeles County; and
- D. Report back on the all the above at the April 2019 Board cycle.



Board Report

File #: 2019-0105, File Type: Policy

Agenda Number:

REVISED
REGULAR BOARD MEETING
FEBRUARY 28, 2019

SUBJECT: THE RE-IMAGINING OF LA COUNTY: MOBILITY, EQUITY, AND THE ENVIRONMENT

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATIONS

APPROVE the staff recommendations to:

- A. PURSUE the Transformational Initiatives that are central to “The Re-Imagining of LA County;”
- B. CONTINUE work on the Twenty-Eight by '28 goal and accelerate the delivery of the remaining eight projects in every feasible way, and report progress to the Board on the acceleration efforts on a quarterly basis; and
- C. DEVELOP proposed funding and financing plans for the accelerated projects, and report back to the Board in ~~September~~ July 2019.

ISSUE

Metro staff proposes the pursuit of solutions to eradicate congestion in LA County, drastically reducing the region’s carbon footprint and combatting climate change, increasing transit frequency and capacity, dramatically improving transportation equity, and putting the County in a position to be the first major region in the world that could offer free transit services. This proposal has been branded as “The Re-imagining of LA County: Mobility, Equity, and the Environment.” This item asks the Board to approve staff recommendation to pursue the Transformational Initiatives to achieve “The Re-imagining of LA County.”

BACKGROUND

LA County is currently home to more than 10 million people and its population is projected to grow to 10.75 million by 2028. This means that an increasing volume of people and goods will need to travel on a transportation network that is already inadequately serving their needs. Overall consumption in the region is expected to intensify the conflicts between passenger and goods movement. Optimizing system capacity to accommodate new growth will be necessary to ensure that the region can meet

these new demands and remain economically competitive in the global marketplace. Significant investments are needed, both to shore up an aging system of roadway and transit infrastructure, as well as to expand and fully utilize available capacity to ensure continued delivery of safe and reliable transportation services.

Historically, transportation policies and investments in LA County have prioritized single-occupancy travel in private passenger vehicles at the expense of providing other high-quality travel alternatives. The result is an inequitable transportation system that exacerbates the divide between those who have the access and means to drive and those who do not, while providing inadequate options for both groups. This system is not sustainable from an economic or environmental perspective. As more people turn to driving alone for speed and convenience, mobility and air quality for all citizens suffers due to the inefficient use of existing roadway space. Changing this paradigm and raising the quality of multiple transportation options is essential to delivering a system that provides better mobility for everyone. This means investing in high-quality transit options that can carry more people in less space, creating incentives to reduce solo driving, and removing incentives that further exacerbate transportation inequities. Moving forward we must align Metro's policies and investments across its portfolio of programs and services to provide more high-quality transportation options for people and, equally important, effectively manage demand from all users.

Metro is considering several "Transformational Initiatives" that demonstrate significant potential to address the widely shared desire to eradicate congestion, improve mobility and air quality, realize equity, and ultimately provide a more sustainable and resilient LA County for all.

DISCUSSION

Metro is currently meeting or exceeding the Measure M schedule on all projects. However, as we complete construction on the first decade of Measure M projects, it is imperative to make concurrent efforts to improve mobility and equity by identifying ways to improve congestion throughout the County. The Transformational Initiatives described below represent bold and progressive ways to achieve a number of our public policy goals as we anticipate new projects coming on line.

Transformational Initiatives **Congestion Pricing**

The Congestion Pricing strategy proposes to investigate the feasibility and framework for conducting congestion pricing pilots with the intent to expand the program in the most traffic-clogged parts of LA County. Congestion pricing offers a compelling mobility solution that, when implemented thoughtfully, can significantly improve equity and reduce emissions by providing cleaner, more frequent and more reliable mobility options for the most vulnerable populations in LA County.

At the January 24, 2019 Board meeting, Motions 43.1 (Butts) and 43.2 (Solis, Garcetti, Dupont-Walker, Butts and Hahn) were presented and approved. Motion 43.1 asked Metro staff to respond to several questions, mostly related to scope and framework of a proposed Congestion Pricing Feasibility Study. Staff have prepared responses to the various parts of Motion 43.1 in a separate Board Receive and File report (File ID 2019-0083). The response includes a detailed plan for the feasibility study, should the Board approve pursuing this recommended strategy as part of the Re-Imagining LA County Plan. The contents of Motion 43.1 and the related response are provided in

Attachment A to this report.

Motion 43.2 focused attention on equity as it relates to the proposed Congestion Pricing Feasibility Study. The motion was comprised of five parts that asked staff to develop an Equity Strategy for the study, engage a variety of experts and stakeholders, and defer congestion pricing implementation until the feasibility study, including the Equity Strategy, is complete. The responses to Motion 43.2 are provided in a separate Board Receive and File report (File ID 2019-0055). The contents of Motion 43.2 and the related response are provided in Attachment B to this report.

Three different pricing models would be explored as part of the study: cordon, corridor, and vehicle miles traveled (VMT). The study will include extensive, comprehensive, and genuine community and public engagement throughout the feasibility study, as promised through the Equity Platform that the Board adopted nearly a year ago. As part of the engagement and technical support to the study, Metro intends to create an Advisory Council to inform the study, including subject matter experts in Equity. Staff will work with the Board to identify candidates for the Advisory Council.

The anticipated schedule to complete this feasibility study is 12-24 months. Staff expects to conduct this study through a consultant contract led by Metro. Staff anticipates addressing the following scope elements in the feasibility study:

- Equity strategy to address potential impacts to historically underserved populations (see Equity Strategy below)
- Research and analysis of three models: cordon, VMT, and corridor pricing
- Analysis of potential revenues
- Analysis of policy implications
- Selection criteria and process to identify potential pilot locations.
- Performance measures and desired outcomes of congestion pricing pilot
- Identification of transit service and improvements needed to provide mobility options in congestion pricing pilot area
- Review of research done to date, and determination of any key gaps in that research that bear on Equity issues.
- An assessment of the potential negative and positive impacts of a congestion pricing strategy on historically underserved populations, including low-income drivers and transit users, as it affects their mobility access to jobs, housing, and other opportunities.

A more detailed plan for a Congestion Pricing Feasibility Study is provided as part of the response to Motion 43.1, referenced as Attachment A to this report.

Equity Strategy for a Congestion Pricing Feasibility Study

Congestion pricing as a comprehensive transportation policy has both challenge and promise. Implementing congestion pricing at a scale that would be effective, even for a portion of Los Angeles County, would exert tremendous change on the transportation network and the people who use it. Thus, staff is very clear that a comprehensive and thorough feasibility study must be undertaken before any actions would be considered for implementation.

Equity must be front and center in a congestion pricing evaluation. The Board's adopted Equity

Platform provides a valuable framework to design an Equity Strategy integral to the Congestion Pricing Feasibility Study.

An equity-driven policy objective for any congestion pricing evaluation would be to improve such access for underserved populations. Data and metrics to evaluate that potential must be incorporated into the Equity Strategy scope of work within the CPFS. More details on an Equity Strategy for a Congestion Pricing Feasibility Study are provided in the response to Motion 43.2, referenced as Attachment B to this report.

New Mobility Fees

Staff proposes to explore the levying of fees for Transportation Networking Company (TNC) trips in Los Angeles County as a mechanism for managing demand on our streets and highways. The shared mobility device strategy also proposes looking at imposing fees on shared devices, such as scooters and bicycles, for the use of public rights-of-way.

Both of these proposals would require building support throughout the state for transferring regulatory and taxation authority from the California Public Utilities Commission (CPUC) to Metro. They would also require building support among cities within LA County for the regulatory authority to be with Metro.

Metro staff has developed a proposed plan to provide more detailed information regarding the timeline and key activities to pursue New Mobility service fees in LA County, if the Board approves these Transformational Initiatives for the Re-Imagining LA County Plan. The proposed plan is provided in Attachment C to this report.

DETERMINATION OF SAFETY IMPACT

This motion response has no direct impact on safety at this time. However, the approval of the Transformational Initiatives will support safe and reliable operations of the transportation system in the long-term.

FINANCIAL IMPACT

If approved to pursue the recommended Transformational Initiatives, funding will be identified to conduct the study and will be the responsibility of the lead department, in partnership with the Office of Management and Budget.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

The proposed actions are fully consistent with Initiative 1.3 of Metro Vision 2028 plan to test and implement pricing strategies to reduce traffic congestion. Also, Initiative 1.3 commits to exploring opportunities for expanding access to shared, demand-responsive transportation options for everyone.

IMPLEMENTATION OF EQUITY PLATFORM

The Transformational Initiatives explicitly address approaches and priorities that would advance the

mobility needs of the County's most vulnerable populations. Managing congestion, particularly to ensure reliable operations for LA County's transit system, upon which many of our most underserved community members depend, enables economic mobility that can help those populations overcome historic disadvantages and disparities. In addition, strategies such as congestion pricing can enable benefits, such as free transit, to these same underserved communities in ways that are unimaginable with traditional approaches. The Metro staff and Board must remain committed to Equity as a key evaluative lens as we consider these progressive strategies for improving mobility, equity, and the environment.

ALTERNATIVES CONSIDERED

The Metro Board of Directors may decide not to approve the pursuit of the Transformational Initiatives to achieve The Re-imagining of LA County. This is not recommended, as this would take the LA region on a similar path followed in the past, without effectively addressing the problems we face even today.

NEXT STEPS

If the recommended actions are approved, Metro staff will return to Board to report on progress as follows:

April 2019 - Review scope for Congestion Pricing Feasibility Study

June 2019 - Award professional services contract to conduct Congestion Pricing Feasibility Study

September 2019 - Report on financing/funding plans for the accelerated projects

Quarterly - Progress reports on efforts to accelerate the eight remaining projects of Twenty-Eight by '28.

ATTACHMENTS

Attachment A - Motion 43.1 and Response to Motion 43.1 (File ID 2019-0083)

Attachment B - Motion 43.2 and Response to Motion 43.2 (File ID 2019-0055)

Attachment C - LA Metro New Mobility Service Fee Plan

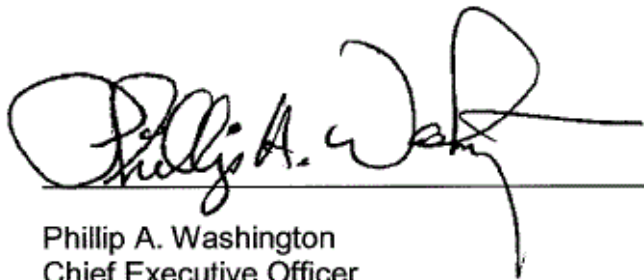
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**STATEMENT OF WORK – TECHNICAL SERVICES
CONGESTION PRICING FEASIBILITY STUDY**

INTRODUCTION

The Los Angeles County Metropolitan Transportation Authority (Metro) is seeking a qualified firm to provide technical services for a Congestion Pricing Feasibility Study (Study or Project). The Contractor shall work with Metro and its Stakeholder and Public Engagement Contractor, which is procured under a separate contract, to engage targeted stakeholders as well as the general public in re-imagining a transformative, high-quality mobility future. This future will be enabled by a pricing strategy and other actions Metro will be undertaking to create a world-class transportation system, as described in the agency's 10-year strategic plan, Vision 2028. (This document can be accessed at metro.net/vision2028). See Attachment A for the Request for Proposal communications and public engagement scope of services for the Study. The Contractor shall coordinate with concurrent efforts undertaken by Metro, including, but not be limited to, those listed in Attachment B and relevant documents in Attachment C.

Metro serves as regional transportation planner and coordinator, designer, builder, funder, and operator for one of the country's largest, most populous counties and employs approximately 10,000 full-time staff. Approximately 10 million people live, work, and play within its 1,433-square-mile service area. In 2017, LA County welcomed 48.3 million visitors, which was record breaking, and 50 million visitors are anticipated in 2020.

BACKGROUND

Los Angeles County is currently home to more than 10 million people and its population is projected to grow to 10.75 million by 2028. This means that an increasing volume of people and goods will need to travel on a transportation network that is already inadequate in serving their needs. Overall consumption in the region is expected to intensify the conflicts between passenger and goods movement. Optimizing system capacity to accommodate new growth will be necessary to ensure that the region can meet these new demands and remain economically competitive in the global marketplace. Significant investments are needed, both to shore up an aging system of roadway and transit infrastructure, as well as to expand and fully utilize available capacity to ensure continued delivery of safe and reliable transportation services.

Historically, transportation policies and investments in LA County have prioritized single-occupancy travel in private passenger vehicles at the expense of providing other high-quality travel alternatives. The result is an inequitable transportation system that exacerbates the divide between those who have the access and means to drive and those who do not, while providing inadequate options for both groups. This system is not sustainable from an economic or environmental perspective. As more people turn to driving alone for speed and convenience, mobility and air quality for all individuals suffer due to the inefficient use of existing roadway space. Changing this paradigm and raising the quality of multiple transportation options is essential to delivering a system that provides better mobility for everyone. This means investing in high-quality transit options that can carry more people in less space, creating incentives to reduce solo driving, providing other quality multimodal options, and removing incentives that further exacerbate transportation inequities. Metro seeks to align its policies and investments across its portfolio of programs and services to provide more high-quality transportation options for people and, equally important, effectively manage demand from all users.

Metro is studying congestion pricing as a transformational approach to address the widely shared desire to genuinely reduce congestion, improve mobility and air quality, improve equity, and ultimately provide

Attachment C: Statement of Work – Technical Services – Congestion Pricing Feasibility Study

a more sustainable and resilient LA County for all. The Congestion Pricing Feasibility Study will investigate the feasibility and framework for conducting a congestion pricing pilot program with the intent to expand the program in the most traffic-clogged parts of LA County, upon approval of the Metro Board of Directors. The study will include extensive, comprehensive, and genuine community and public engagement throughout the feasibility study, which will be led by Metro and a Communications and Public Engagement Contractor under a separate contract.

Three different pricing models will be explored as part of the study: cordon, corridor, and vehicle miles traveled (VMT). Initial concepts of these models are as follow:

- **Cordon Pricing.** This involves creating a boundary around a central district and then charging vehicles to cross that boundary. The fee can be variable, meaning it can go up or down based on demand. Alternatively it could be set at a specific rate for peak times. Either way, the idea is to reduce the number of vehicles entering a central area when demand is higher. This is the most common method of congestion pricing employed around the world.
- **VMT Pricing.** Charging drivers based on Vehicle Miles Traveled (VMT) has been floated for many years as a potential substitute for a gas tax. However, a VMT fee platform can potentially be used to charge variable prices based on location and time of day. The platform could conceivably charge zero when there is no traffic or in uncongested areas, but then charge high enough rates during peak times to deter overuse. There have been VMT-fee experiments in California, Oregon, and Iowa. While none of these pilots have attempted to include additional fees for congestion, the Oregon pilot tested the idea by calculating the number of miles driven in the “congestion zone”. In short, the technology exists to use VMT as a method of alleviating congestion but it has not yet been attempted due to political challenges.
- **Corridor Pricing.** Corridor pricing, as described in this context, is a new kind of congestion pricing that has not been implemented anywhere. The idea is to price all lanes on all roads within a specific corridor with high traffic congestion but a viable public transit alternative. Functioning similar to cordon pricing, anyone traveling within a designated corridor during peak times would pay a fee based on how many miles they travel within the corridor. The price for travel within the corridor would be set high enough to ensure free flow traffic within that entire corridor.

PROJECT OBJECTIVE

The objectives of the Study include:

- To investigate the feasibility and framework for testing and implementing pricing strategies to reduce traffic congestion and to dramatically improve equity, mobility, and environmental outcomes
- To extensively, comprehensively, and genuinely engage stakeholders and the public in this Study process to help solve the traffic problems in Los Angeles County and develop widespread support for a pilot program
- To identify location(s) for a pilot program and establish an implementation plan

The Contractor shall provide technical services for the Congestion Pricing Feasibility Study. All deliverables rendered under this contract shall be in accordance with each task description outlined under the Scope of Services.

Attachment C: Statement of Work – Technical Services – Congestion Pricing Feasibility Study

PROJECT MILESTONE SCHEDULE

The performance period for the Congestion Pricing Feasibility Study shall be up to 24 months from the Notice to Proceed. The Contractor shall propose a realistic and effective project milestone schedule and timeline that meet the intent and outcome of this scope of services and take into consideration the communications and public engagement work, which is under a separate contract.

Milestone	Anticipated Completion
Start of work/kickoff	Upon contract award
Project Management Plan submitted to Metro	Two weeks after contract award
CEQA compliance plan, with preliminary recommendations (See Task 9)	Two weeks after contract award
Draft Communications and Public Engagement Plan submitted to Metro*	Four weeks after contract award
Final Communications and Public Engagement Plan submitted to Metro*	Six weeks after contract award
Completion of Congestion Pricing Feasibility Study	Up to 24 months after contract award

*This milestone will be the responsibility of the Communications and Public Engagement Contractor and is listed here for informational purposes.

Note: All dates and timelines are tentative and subject to change.

MINIMUM QUALIFICATIONS

Minimum qualifications are required for a Contractor to be eligible to submit a proposal response. Your submittal response must show compliance to these minimum qualifications. Those that are not responsive to these qualifications shall be rejected by Metro without further consideration:

- A project manager with a minimum of five years of experience as a project manager and have demonstrated experience in successful implementation of congestion pricing, tolling, or programs that use pricing to manage demand in transportation.
- Key project team members have demonstrated expertise and a minimum of five years of experience in successful implementation of congestion pricing, tolling or programs that use pricing to manage demand in transportation.
- Key project team members have demonstrated experience and a minimum of two years of experience working with similar technical, policy, political, and equity components.
- Key project team members have demonstrated experience and a minimum of two years of experience in successful compliance with the California Environmental Quality Act (CEQA) (Pub. Resources Code, § 21000 et seq.), including familiarity with CEQA's statutory and categorical exemptions and associated evidentiary, written findings, and notice requirements.

SCOPE OF SERVICES

The scope of services for the Congestion Pricing Feasibility Study is divided into two components:

- Technical Services (Under this RFP)
- Communications and Public Engagement Plan and Implementation Services (Under a separate RFP)

The Proposer may offer a response to Metro's Request for Proposal (RFP) for one or both of these project components. While Metro recognizes that selecting one contractor team for both components may provide attractive efficiencies, it also aims to secure the most-qualified assistance for this Project. A

Attachment C: Statement of Work – Technical Services – Congestion Pricing Feasibility Study

contractor team proposing a response for both components may be asked to participate in two separate interviews, as appropriate.

Throughout this Project, work activities and analyses shall be coordinated and integrated across the parallel activities related to the two project components: A) Technical Services and B) Communications and Public Engagement Plan and Implementation Services (under a separate contract). The Contractor shall ensure that major overlaps are coordinated. Whether proposing on one or both components, the Contractor shall clearly identify major overlaps and identify how they will be addressed.

Task 1: Project Administration, Management, and Coordination

Task 1.1 General Project Administration, Management, and Coordination

The Contractor shall provide management and any necessary staff to plan, organize, direct, supervise, control, and coordinate the administrative aspects of the Project, including contract and subcontract administration, accounting/invoicing, office services, and personnel administration.

The Contractor shall closely communicate with Metro's Project Manager (PM) and provide updates to the project weekly, biweekly, or as needed and during key milestones; provide dates, times, and locations of upcoming key meetings; identify issues that may impact the Project's implementation or schedule; and recommend and implement actions to keep the Project on schedule and budget.

The Contractor shall establish a method to identify potential cost overruns and maintain project budget. The Contractor shall be responsible for overseeing quality control and ensuring that all deliverables are in line with Metro's requirements. The Contractor may be part of a project team consisting of other outside Contractors, Metro cross-departmental representatives, partner organizations, and third party stakeholders and shall work collaboratively and effectively within this team environment. The Contractor shall anticipate participating in outreach meetings and coordinating with appropriate agencies and stakeholders throughout the duration of the contract period.

The Contractor shall develop a Project Management Plan that includes, at minimum, project meeting schedule, a detailed breakdown of the project costs by task/subtask, a detailed staffing plan by task/subtask, organizational chart, a detailed schedule for each work task/subtask, risk management plan, and an overall work flow chart identifying critical work path items. The Project Management Plan shall provide the basis by which the project status will be measured and shall include methods to identify potential cost overruns and maintain project budget.

All reports, memoranda, and documents identified as deliverables in this and subsequent tasks shall be sent electronically to Metro's PM. The Contractor shall closely communicate with Metro's PM and provide updates, which may include teleconference or in-person meetings with Metro

Deliverables:

- Arrange, schedule, and staff necessary meetings and coordination and provide logistical support where necessary
- Draft and final Project Management Plan

Task 1.2 Project Status Meetings

The Contractor shall participate in project status meetings with Metro and the Communications and Public Engagement Contractor bi-weekly or as needed for the duration of the contract. The Contractor

Attachment C: Statement of Work – Technical Services – Congestion Pricing Feasibility Study

shall prepare agendas in consultation with Metro's PM. Meeting agenda draft shall be provided to Metro's PM at least two business days prior to the meeting. The Contractor shall provide meeting summary, including action items, to Metro's PM within two business days after the meeting. The purpose of the meetings shall be to coordinate work activities; refine assessment methodology; identify strategies, as necessary, for CEQA compliance; report and document project status; discuss and identify any unforeseen issues; highlight problems and corrective measures; recommend action plans proposed to keep project on schedule and budget; discuss any work products; prepare for advisory panel and other outreach meetings; and present next steps.

Deliverables:

- a. Meeting agenda and summary, including action items, in electronic Microsoft Word format. Meeting agenda draft shall be provided to Metro's PM at least two (2) business days prior to meeting. Meeting minutes shall be provided to Metro's PM within two (2) business days after meeting; and
- b. Project meetings with Metro and the Communications and Public Engagement Contractor.

Task 1.3 Online Electronic Document Repository

The Contractor shall provide a secure online electronic document repository for the duration of the contract. The Contractor shall provide an index file and table of contents for ease of document access. The repository shall be updated within two (2) working days of the distribution of the deliverable. All printed deliverables submitted shall have a corresponding electronic file submitted to this repository as a controlled document, unless otherwise indicated by Metro's PM. Upon completion of the Project or at the request of Metro, all contents shall be transferred to Metro. The Contractor shall work with Metro's PM on the organization of the repository and contents to be stored and uploaded. The Contractor shall update and maintain the repository for the duration of the contract. The Contractor shall use existing software or tools that are readily available on the market, rather than creating new software to perform this task.

The purpose and functionality of the repository shall include, but not be limited to:

- Consolidation, search, storage, browsing, retrieval, and version tracking of all deliverables.
- Ability to store related files (e.g., comment/review files, attachments, etc), with no limits on file size.
- Allows Metro to establish accounts for others to view the materials, through a secure system that supports varying levels of privileges, permissions, or other account configuration options as needed to control access rights. Also allows Metro to adjust these privileges, permissions, or other account configuration parameters on demand.
- Allows Metro to provide formal digitally signed acknowledgement of acceptance of those deliverables as instructed by Metro.
- Allows for nested folder structures for file organization.
- Supports the storage and display of extended metadata including: Title/Subtitle, Date, Authors, Contact Information for Authors, Contract number, Type of deliverable (draft, final, etc), Abstract, Distribution Statement (e.g., restricted, unrestricted), number of pages.
- Contain documentation related to this Project, including, but not be limited to, the Contractor's Project Management Plan, Communications and Public Engagement Plan, key correspondence, reports, maps, photos, videos, graphics, project deliverables, key contacts, etc.

Deliverables:

- a. Set-up and maintain a secure, online repository; training materials; and user guide.

2: Support Stakeholder and Public Engagement

The objectives of this task include:

- Establish grass-roots and widespread support for a pilot program
- Identify stakeholders, individuals and organizations, to engage
- Establish multiple forums and methods for meaningfully engaging with stakeholders and communities, such as in-person and virtual meetings, pop-ups, social media platforms, surveys, and a variety of other methods specific to the context and needs of different communities
- Inform project development and implementation of a pilot program

Stakeholder and public engagement will be a key component of this project and will be led by a Communications and Public Engagement Contractor (under a separate contract) and Metro. The Contractor shall provide the necessary support to help Metro and the Communications and Public Engagement Contractor prepare and execute a comprehensive strategy to listen, inform, and engage stakeholders and the general public in order to achieve the objectives of the Project. Particular care should be taken to include the traveling public; Metro customers who use the agency's portfolio of services; community-based organizations; faith-based institutions; the business community, including employers and freight industry representatives; labor organizations; transportation and transit advocates; and groups who serve the underrepresented populations in LA County. This would ensure a broad reach as well as obtain the most comprehensive input possible from diverse stakeholders. Attachment D includes the categories of audiences that will be included in this process. The Contractor may recommend additional audiences and individuals.

The Contractor shall work closely, collaboratively, and effectively with the project team to ensure that information, analysis, and findings are closely shared and used iteratively to inform stakeholder and public engagement. The Contractor shall participate in outreach meetings to identify project objectives, principles, key issues, preferences, opportunities, needs and other considerations to help inform the project's approach, strategies, and outcomes. In addition, the Contractor shall provide technical support on advisory panels associated with the Congestion Pricing Feasibility Study, including, but not be limited to: A) Users of the Transportation System and B) Stakeholders. See Attachment E for more information. The Contractor shall lead the preparation of the presentation materials and content for the advisory panel meetings in consultation with the Metro project management team. The Contractor shall translate technical concepts into easy to understand information for the layperson. With support from the Communications and Public Engagement Contractor, the Contractor shall develop presentations, materials, visual information, and activities to help facilitate understanding, comprehension, and engagement with the target audience, to get meaningful input, and to inform the path forward.

The Contractor is encouraged to think creatively and innovatively about how best to present concepts in an engaging way that is easy to understand, helps people identify with lived experiences, and helps participants re-imagine a transformative mobility future that can be enabled by a pricing strategy and complemented by actions laid out in Vision 2028.

Deliverables:

- a. Participation during advisory panel meetings; presentation content; meeting agendas, sign-in sheet, and summaries
- b. Participation in outreach meetings/workshops conducted; meeting agendas, sign-in sheet, and summaries
- c. Presentations, materials, and visual information to help facilitate understanding, comprehension, and engagement with the target audience, to get meaningful input, and to inform the path forward

Task 3: Conduct Literature Review and Best Practices Research

The Contractor shall identify congestion pricing best practices and current efforts within California, nationally and globally, including pricing model, approach, public acceptance, performance measures, outcomes, and trends over time to inform the Project. In addition, the Contractor shall glean specific information, such as:

- Operational characteristics and policies used in other comparable deployments.
- Outcomes, reactions, and results associated with other comparable deployments.
- Operating and political environments that were conducive to success (or failure) of past deployments.
- Inter-agency arrangements, collaborations, partnerships, and memoranda of understanding that fostered success in past projects (or, conversely, led to challenges).
- Best practices and lessons learned from past deployments

The Contractor shall review research done to date regarding transportation and equity and determine any key gaps in that research that bear on equity issues that would inform the project and recommend a path forward. The Contractor shall build on any existing literature review and best practices research rather than duplicating those efforts. The Contractor shall build upon existing and current studies and initiatives underway at Metro and related efforts undertaken by other local and regional governments. The Contractor shall review background documents, project-related studies underway and other supporting documents, including, but not be limited to, those listed in Attachments B and C.

Deliverables:

- a. Draft and final report(s) that Metro can share with the public, stakeholders, elected officials and the media that highlight key points and summarizes findings and best practices. The report(s) must be well organized, easy-to-read, and include photographs, graphics, and maps, as applicable. The report(s) shall be made available in print and via digital delivery.
- b. Infographics, digital graphics, maps, and visual displays, as applicable, that highlight key points and can be disseminated to interested parties digitally and in print.

Task 4: Develop Equity Strategy

The objectives of this task include:

- Understand population groups, modes (including freight), and geographies that would be affected by different pricing models;
- Assess the potential negative and positive impacts of a congestion pricing strategy on historically underserved or disadvantaged populations, as it affects their mobility access to jobs, housing, and other opportunities; and
- Assist Metro in developing an equity strategy for congestion pricing to improve outcomes for underserved or disadvantaged populations.

See the reference section at the end of this Task for a list of relevant publications, particularly the 2019 study published by TransForm called *Pricing Roads, Advancing Equity*. This task references and will be built upon work in other tasks within this scope of services, in particular Task 2 (Stakeholder and Public Engagement), Task 3 (Literature Review/Best Practices Research), and Task 10 (Financial Plan) that will consider revenues and costs of each congestion pricing approach.

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In collaboration with the stakeholder and public engagement effort, the Contractor shall assess equity impacts and develop an equity strategy for each congestion pricing approach under consideration. These will include looking at both minimizing negative and disproportionate impacts of the proposed congestion pricing approach as well as considering the opportunities to use road pricing to redress systemic inequities across targeted communities. The contractor should consider equity both relative to the status quo scenario and for potential new scenarios relative to one another.

The approach to this analysis is laid out in the Transform Study, but includes the following basic components:

- a. Identify Who, What, and Where
- b. Choose Equity Outcome and Performance Indicators
- c. Determine Benefits and Burdens
- d. Devise Programs to Advance Transportation Equity
- e. Provide Accountable Feedback and Evaluation

For the purposes of this Study, items (a) – (c) are considered the “assessment” of each congestion pricing approach and can be summarized in writing and/or in a matrix format. Below is a summary of the approach to each item as defined by the TransForm study; however, the Contractor may recommend different assessment method and measures that would effectively achieve the objective of this task and intent of the Project, with concurrence from the Metro project management team.

- a. **“Who”** is a comprehensive description of the populations that need to be considered from an equity perspective. This should consider whether and which populations should be given priority, and also ensure that criteria used to define groups is fair and accurate. A key consideration noted in the study is how income brackets are defined and considered when identifying potential equity impacts, and right-sizing income-defined “groups” to match potentially impacted communities and groups.

The **“what”** will be largely defined by the congestion pricing strategies identified in Task 5, but that section should ask and answer whether any strategies not considered would better serve vulnerable communities, and if these strategies were left out, it should be disclosed why. This section should also acknowledge any strategies or priorities identified by the communities in the geographic areas targeted.

Lastly, the **“Where”** must consider if the potential impacts and/or vulnerable populations are within the study area boundaries, or if they visit. It also considers if services used by the relevant populations are within the study areas, and looks at growth projections to understand future implications.

- b. For **equity and outcome performance indicators**, TransForm identifies three key measures: affordability, access to opportunities, and community health. The study further provides detail on the specific indicators for quantifying impacts on these measures. The Contractor may suggest different or additional measures in their response to this task.
- c. **Determine benefits and burdens.** This section is the analysis of the impacts of each congestion pricing option on the identified populations (part a) and across the outcomes and performance indicators (part b). One approach to this analysis could be to compare the outcomes and

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performance indicators’ expected performance if the status quo is maintained versus with each congestion pricing strategy in place. The Contractor may also recommend other approaches that would be equally or more effective.

- d. Based on the analysis in part c, this section will provide a general summary of **best practices, programs and strategies that advance transportation equity** for each congestion pricing strategy under consideration. Working closely with the analysis in Tasks 8 (Complementary Multimodal Mobility Services and Improvements) and 10 (Financial Plan), each strategy shall include high level cost estimates for implementation, tracked to the revenues generated by the congestion pricing mechanism in question; meaning there should be a rough order of magnitude estimate of the costs to implement each transportation equity strategy.
- e. Similar to part (d), the Contractor shall recommend approaches to **feedback and evaluation to monitor and assess the equity impacts** of each congestion pricing strategy. These approaches should assume iterative review of the pricing strategy, to assure that impacts are monitored over time as the program matures. The strategies do not have to be fully formed, but rather can be a summary approach that could be further developed should the congestion pricing strategy move to a next stage of development.

Deliverables: Deliverables for this section can be a combination of written text/reports and/or matrices that track each equity consideration for each congestion pricing strategy.

- a. Equity impact assessment that includes:
 - o Definition of impacted/vulnerable communities
 - o Summary of additional congestion pricing strategies that were not being considered, and why
 - o Description of how the boundaries of each pricing strategy relate to vulnerable populations
 - o Impacted populations
 - o Comparative impacts of each strategy in a matrix
 - o Equity outcome performance indicators
 - o Potential benefits and burdens of each congestion pricing strategy, for each identified outcome indicator
 - o Equity strategies for each congestion pricing approach, along with potential costs for implementation
 - o Performance evaluation and feedback measures for each congestion pricing approach

References

- “Pricing Roads, Advancing Equity,” by Stuart Cohen and Alan Hoffman. TransForm. 2019. <http://www.transformca.org/transform-report/pricing-roads-advancing-equity>
- San Francisco MUNI: www.sfmta.com/projects/muni-service-equity-strategy
- Seattle: <http://www.seattle.gov/transportation/projects-and-programs/programs/transportation-equity-program>
- “Assessing the Environmental Justice Effects of Toll Implementation or Rate Changes: Guidebook and Toolbox,” National Cooperative Highway Research Program (NCHRP). 2018. <https://www.nap.edu/catalog/24991/assessing-the-environmental-justice-effects-of-toll-implementation-or-rate-changes-guidebook-and-toolbox>

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Task 5: Assess Transportation System and Define Congestion Pricing Alternatives

The objective of this task is to assess the current transportation system and develop and screen alternative congestion pricing models (i.e., cordon pricing, VMT pricing, corridor pricing), geographic configurations, operational parameters, and phasing for alternative locations.

The Contractor shall conduct a preliminary assessment to establish a baseline and conduct initial screening to narrow down potential locations, such as identifying traffic congested areas within LA County, and complemented by input from stakeholder and public engagement efforts. The Contractor shall recommend an approach and methodology, based on sound and justifiable rationale, to identify potential pilot areas and to conduct the subsequent assessment that is mentioned within this task. This effort shall be further informed by findings and lessons learned from the Southern California Association of Government's work on the "Mobility Go Zone & Pricing Feasibility" Study (2019), applicable findings in Task 3 (Literature Review and Best Practices Research), and concurrent and related efforts underway as shown in Attachments B and C.

After the initial screening has been conducted and potential pilot areas identified, the Contractor's assessment should include, at a minimum, the following components:

- a. Conduct market research to gauge people's transportation behaviors, attitudes, priorities, and demographic characteristics and identify the different market segments; pricing and willingness to pay; level of acceptability; and other topics to help inform the development and implementation of an effective pilot program.
- b. Assess existing transportation system costs and payments
- c. Assess travel demand and transportation system impacts of the pricing alternatives, including:
 - o auto demand;
 - o transit ridership;
 - o multimodal walk, bicycle, New Mobility;
 - o freight;
 - o capacity of the existing and planned transit and transportation system to accommodate forecast shifts in demand;
- d. Assess the economic, environmental and social/equity impacts of the pricing alternatives including:
 - o user costs,
 - o household cost impacts by location and income, and
 - o Regional accessibility impacts;
- e. Establish goals and objectives for congestion pricing alternatives, informed by feedback from stakeholder engagement and advisory panels
- f. Develop initial list of pricing alternatives using factors such as location; potential variations in zonal systems as appropriate; extent of the highway and arterial network (e.g., to capture through-trips on the highway and arterial network); potential multi-modal enhancements on other modes, such as transit and active transportation; modifications to hours of operation, operating policies, and enforcement; variations in entry/exit charge points or internal movements; and potential variations in complementary measures (transit accessibility and service levels, other improvement initiatives including parking and traffic management projects).
- g. Identify the merits of each alternative at a high level, including, but not be limited to, the potential to improve person throughput, create mode shift, increase transit ridership, reduce congestion, and improve mobility. Additionally, this screening should consider the ease of implementation and likely stakeholder support.
- h. Define pricing structures (toll policy alternatives), including variable rates by location and time of day or time of week, potential discounts or exemptions

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- i. Examine integration with parking pricing policies
- j. Examine integration with other modes and mobility services
- k. Examine integration with Metro’s existing and upcoming portfolio of services (e.g. ExpressLanes, transit, Bike Share, Mobility on Demand, MicroTransit, etc) and those of other public and private mobility providers (e.g., ridehailing service)
- l. Examine existing incentives for employees and private businesses and recommend strategies to incentivize employers to stagger work shifts

The approach, methodology, modeling assumptions shall be sound and justifiable. The Contractor may recommend different or supplemental assessments that would effectively achieve the objective of this task and intent of the Project, with concurrence from the Metro project management team. Technical analysis should be balanced and closely coordinated with stakeholder and public engagement to ensure that the analysis includes input and feedback iteratively and before final detailed analysis is undertaken. Visuals and graphics shall be highly engaging and easy to understand by the general public.

Deliverables:

- a. Draft and final memo that includes the following:
 - Summary of methodology and approach for conducting market research
 - Summary of market research overview, analysis, and findings
- b. Draft and final memo(s)/report(s) summarizing methodology, analysis, and findings from the initial screening and from the subsequent assessment, including b – l above. This shall include model parameters and assumptions, where applicable.
- c. Draft and final report that includes the following:
 - High-level definition of preliminary list of pricing alternatives
 - Detailed definition of at least four alternatives for more detailed evaluation based on high-level screening
 - Documentation of integration approach
- d. Visuals and graphics that are engaging and easy to understand by stakeholders and the general public

Task 6: Develop Technical and Policy Framework for Evaluation and Conduct Performance Evaluation of Congestion Pricing Alternatives

The objectives of this task include:

- Develop and document the policy framework and methodology for evaluating alternatives defined in Task 5 and evaluate those based upon the methodology;
- Reach consensus on a preferred option; and
- Assess the impacts of free or reduced-fare public transit in the same corridor to determine whether that is worth offering as an added benefit.

The evaluation framework must include a policy element and a technical element. The policy element will focus on “what” criteria to include in the evaluation framework, based upon the alternatives defined under Task 5. Examples of evaluation criteria include stakeholder/ public acceptance; community, business, and economic impacts; transportation performance impacts; revenue generation; impacts of free or reduced-fare public transit in the same corridor; and revenue usage, as appropriate. The Contractor may suggest different or additional criteria in their response to this task, with concurrence from the Metro project management team. The technical element will focus on “how” the evaluation will be conducted. This will include the identification of appropriate models to use, measures to be

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produced in the models, and how other evaluation criteria will be addressed. Economic analyses should consider both the regional and localized impacts of alternatives, including impacts on various demographic groups.

The Contractor shall document its proposed evaluation framework, and then discuss it with the project management team, and present it to appropriate stakeholders. The Contractor shall compile the feedback, discuss changes to the proposed framework, and then finalize the framework in a memorandum, which will serve as the blueprint to guide the evaluation process.

The Contractor shall conduct the alternatives analysis in accordance with both the technical and policy evaluation framework and develop a report summarizing the results. As a part of this process, the Consultant shall implement all technical model modifications identified in the evaluation framework, including collection of data as appropriate, to analyze alternatives defined in Task 5. The Contractor may recommend a different method that would effectively achieve the objective of this task and intent of the Project, with concurrence from the Metro project management team.

Deliverables:

- a. Draft and final memo that includes the following:
 - Proposed technical and policy evaluation framework
 - Model enhancement and data collection plan
- b. Draft and final report, include performance evaluation, traffic analysis, economic analysis, and preferred congestion pricing alternative
- c. Project-generated data files and enhanced travel demand model
- d. Visuals and graphics that are engaging and easy to understand by stakeholders and the general public

Task 7: Define Technology Requirements

The objectives of this task include:

- Specify the functional requirements of technology for the pilot program, including toll collection, enforcement, traveler information, and other technology required for implementation.
- Research and identify emerging technologies for gathering data and collecting tolls to identify future options that are less infrastructure-intensive than current options.

System design criteria such as cost, performance, reliability, maintenance and operations, and simplicity will be critical in determining requirements that meet the proposed pricing program goals. Another consideration in developing the toll collection system for the pilot program will be integration with the existing Metro ExpressLanes system to provide a seamless experience for the traveling public. Metro's ExpressLanes System continues to evolve, so the Contractor shall consider opportunities for leveraging emerging technologies for gathering data and collecting tolls to identify future options that are infrastructure-light and more cost-effective. Technology evaluation will include identification of implementation costs and schedules; system deployment requirements, including technology infrastructure needs; institutional, legal, and enforcement requirements, including addressing privacy issues as applicable; and intelligent transportation systems (ITS) architecture requirements.

Deliverables:

- a. Draft and final report that includes:
 - Summary of research findings,

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- Evaluation of technology options,
- Selection criteria and rationale,
- Functional requirements of appropriate technology

Task 8: Define Complementary Multimodal Mobility Services and Improvements

The objective of this task is to identify the types of services, projects, and programs that should be in place before pricing is implemented, including transit service and other multimodal mobility services and infrastructure-light improvements needed to encourage and serve mode shift. The intent is to use the existing transportation system more efficiently rather than to widen roadways to add capacity.

The Contractor shall identify the complementary multi-modal mobility services and infrastructure-light improvements that need to be in place, both within and outside of the pilot area, before pricing is implemented. The multi-modal mobility services shall include a suite of transportation mode options, such as increased transit services (e.g., frequency or new bus routes), increased regional rail services (e.g. frequency), bicycle facilities, pedestrian enhancement, Transportation Network Company partnerships, other shared mobility options, or other innovative strategies to provide high-quality mobility options. The types of service and infrastructure improvements shall be identified based on pricing alternatives identified in Task 5 (Assess Transportation System and Define Congestion Pricing Alternatives) and Task 6 (Develop Technical and Policy Framework for Evaluation and Conduct Performance Evaluation of Congestion Pricing Alternatives) and with input from stakeholders. The program of services should respond to the specific travel demand that will be impacted by each congestion pricing alternative.

Once the pilot program area(s) has been identified, the Contractor shall inventory the existing transit services and other multimodal facilities, and develop a list of location-specific improvements that can be implemented in the short-term time frame of 12 months. These improvements may include, but are not limited to, enhancement to the existing transit services, new bus rapid transit or express bus services, microtransit, transit hub upgrades, bus lanes, signal queue jumpers and other transit priority treatments, bicycle and pedestrian infrastructure improvements, shared bike services, first and last mile connection, etc. Other innovative strategies to provide high-quality mobility options shall also be explored with community input. In addition, the Contractor shall develop a rough-order-of-magnitude cost estimate for each recommended improvement and an estimation of the mode splits with all the improvements combined. The Contractor shall also work with Metro and stakeholders to develop performance measures for the alternative travel modes. The Contractor is encouraged to think creatively and innovatively about how to implement temporary treatments, tactical urbanism, pop-ups, and other approaches that can help the public re-imagine the enhanced streetscape and gain support for such improvements. The Contractor shall work with the affected municipalities, Metro, and community stakeholders in concept development and recommendations.

Deliverable:

- a. Draft and final matrix and/or report summarizing types of service and infrastructure improvements for each pricing alternative.
- b. Draft and final report detailing the complementary multi-modal services, infrastructure-light, and near-term improvements for each of the alternatives and the location specific improvements pertaining to the pilot program area(s) to be implemented within a one year timeframe, should the Metro Board of Directors approve proceeding with implementation of a pilot program.

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Task 9: Assess Institutional and Legislative Requirements for Implementation

The objectives related to this task include working with Metro’s Legal department on:

- Identifying how potential pricing scenarios and implementation of pricing will integrate with existing local, state, and federal legal frameworks, including, tolling, privacy, environmental laws.
- Outlining needed legislative authority at the local, state, and the federal level in order to conduct the pilot, should the Metro Board of Directors approve proceeding with implementation of a pilot program.
- Evaluation of Metro’s institutional arrangements and governance, Metro’s ability to administer and collect fees, issuance of bonds for financing capital expenditures, as needed, and agreements with private entities and government agencies.
- Identifying actions necessary to obtain approvals for: (1) collecting tolls; (2) incurring debt; (3) enforcing tolls; (4) procuring and contracting for design, construction, operation and maintenance; and, (5) financing.
- Clarify and identify strategy to demonstrate CEQA compliance for the pilot program should the Metro Board of Directors approve proceeding with the pilot program. The Contractor shall develop a CEQA compliance plan that includes, at a minimum, a preliminary recommendation, in consultation with Metro staff, and subject to the concurrence of Metro’s legal counsel, as to whether the Project is statutorily or categorically exempt from CEQA compliance. The preliminary recommendation shall be delivered within two (2) weeks after the start of work/kick off. If the preliminary recommendation concludes that the Project is not exempt from CEQA compliance, the Contractor shall make a recommendation as to what type of environmental review document (e.g., environmental impact report or mitigated negative declaration) would be required for the Project.

Deliverables:

- a. Draft and final technical report addressing the legislative and institutional requirements for implementing a pricing program
- b. CEQA compliance plan

Task 10: Develop Investment and Financial Plan

The objective of this task is to develop a comprehensive investment and financial plan for the preferred alternative(s) defined in Task 6 (Develop Technical and Policy Framework for Evaluation and Conduct Performance Evaluation of Congestion Pricing Alternatives).

Infrastructure, equipment, and operational needs

Identify the infrastructure investments and operational needs for each of the congestion pricing alternatives developed for the Study (assuming the alternative is adopted and implemented). The capital investments and other needs should be consistent with the Task 11 implementation plan, and could include toll collection structures, transponders, technology, centralized administrative and operations facilities, improvements to existing transit, infrastructure improvements, etc.

In addition to capital investments, identify the activities needed to operate and maintain the congestion pricing alternative, which may include labor and expenses related to administration, maintenance, enforcement. The work could be performed directly by the assumed congestion pricing entity/enterprise, or privately contracted. If changes to existing transit service or streets and highways are part of the alternative, identify the change in transit operations provided by Metro or local operators, for both bus and fixed-route service, as well as any operational impacts on cities or other governments that could arise from modification to parking, use of street and roads, or other factor.

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Cost and revenue estimates

Estimate the capital and operating costs for the identified infrastructure, equipment, and operational needs for each of the alternatives developed for the study. Include estimates for all significant costs that would be incurred by the congestion pricing entity/enterprise, and any affected transit or other public agency, which would need to be recovered or reimbursed. The cost estimates should be credible and reliable, in order to assess the feasibility of the enterprise.

Based on the identified mechanism or scheme used to charge travelers, provide the rates, number of trips charged, and total estimated revenue from the congestion pricing alternative. Revenue scenarios may be needed depending on the uncertainty of the estimate or to evaluate alternative rates or other aspects of the pricing mechanism.

Financial plan

Using the estimate of costs and revenues, prepare annual sources and uses of funds, covering twenty years, for the entity/enterprise that is assumed to administer and operate the congestion pricing alternative. The costs should include upfront capital and debt costs associated with the identified infrastructure and equipment needs, ongoing operations and maintenance expenses and capital investments, and any payments made to other agencies as a reimbursement. The revenues should include the congestion pricing revenue, and any fines and penalties, parking fees, contributions in-kind or monetary payments from private and government entities, and assumed local, state, or federal grant funding.

Identify any net revenue from the congestion pricing enterprise that would be available for other non-enterprise uses, including transfers in excess of the reimbursement of costs to Metro, regional transit providers, or jurisdictions.

Deliverables:

- a. Draft and final report with accompanying narrative and numerical information for each congestion pricing alternative, including a description of the infrastructure, equipment, and operational needs; cost and revenue estimates; and financial plan.

Task 11: Develop Implementation Plan

The objective of this task is to develop a detailed phasing and implementation plan, a concept of operations (CONOPS), design concepts and functional requirements, and integration with Metro's existing and future mobility portfolio. The implementation plan will draw upon the findings and recommendations from the analyses completed in previous tasks and also include a detailed financial plan.

The CONOPS will include identification of institutional roles/responsibilities in the collection, administration, and distribution of revenues; technology requirements; design concepts; and performance management. Additionally, monitoring plans will be developed to conduct before-and-after assessments of travel time savings, economic, environmental, and safety benefits, as appropriate.

Deliverables:

- a. Draft and final implementation plan, including design concepts, functional requirements, concept of operations, and financial plan for pilot program

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Attachment A: Statement of Work – Communications and Public Engagement Services for Congestion Pricing Feasibility Study

Attachment B: Concurrent Efforts Undertaken by Metro

Title	Description	Access Link
Vision 2028 Strategic Plan	Metro's 10-year strategic plan to improve mobility in Los Angeles County, adopted in June 2018.	https://www.metro.net/about/metro-vision-2028-plan/
Equity Platform Framework	A multi-point equity platform that provides a basis for Metro to actively lead and partner in addressing and overcoming disparity among neighborhoods and individuals, adopted by Board in May 2018, and in process for developing and adopting performance metrics.	https://boardagendas.metro.net/board-report/2017-0912/
Community-Based Organization (CBO) Partnership Strategy	Metro is developing an agency-wide CBO Partnership Strategy that will inform how Metro works and partners with CBOs on programs, projects, and initiatives. To align with Metro's Equity Platform Framework, the Strategy includes how Metro provides opportunities to qualify and bid for contracts.	
NextGen Bus Study and World Class Bus Initiatives	Metro's most recent bus study comes 25 years after its last system-wide overhaul. The purpose of the study is to understand the current transit market demand in LA County and to study Metro's current bus system and how well it serves current and potential customers.	https://www.metro.net/projects/nextgen/
MicroTransit Pilot	Metro is partnering with private sector teams to develop on-demand technology to increase access to Metro's transit system and to improve the user experience of our customers.	https://www.metro.net/projects/microtransit/
Long Range Transportation Plan (LRTP) Update and Our Next LA	LRTP's purpose is to plan and program transportation investments comprehensively and thoughtfully using a participatory process. The LRTP is in the process of being updated to incorporate Measure M's scope.	https://boardagendas.metro.net/board-report/2017-0548/
Bus Rapid Transit Vision and Principles Study	Metro is in the process of conducting a Bus Rapid Transit Vision and Principles study, including development of Bus Rapid Transit design guidelines, performance metrics, and prioritized list of corridors.	http://media.metro.net/projects_studies/brrt/report_BRT_VisionandPrinciples_2018-10-17.pdf
Comprehensive transportation system pricing study	Metro will be launching a study that analyzes pricing across all of Metro's portfolio of services.	

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(future effort)		
Benchmarking modeshare study (to initiate in 2019)	Metro is beginning the process of establishing a baseline mode share for all trips and all purposes to track progress of Vision 2028 implementation	
ExpressLanes “Pay-As-You-Go” Pilot	In January 2019, Metro Board approved a one-year pilot of the “Pay As You Go” model, which allows drivers to use Metro Expresslanes without a FasTrak transponder.	https://boardagendas.metro.net/board-report/2018-0703/
Metro ExpressLanes Low Income Assistance Program	Low Income Assistance Program for ExpressLanes	https://www.metroexpresslanes.net/en/about/plans_lowincome.shtml
I-10 ExpressLanes Busway Pilot Program	Implementation plan for the I-10 ExpressLanes Pilot Program	https://boardagendas.metro.net/board-report/2018-0562/
ExpressLanes Strategic Plan	This Countywide ExpressLanes Strategic Plan builds on the success of the I-110 and I-10 Congestion Reduction Demonstration pilot program (also known as ExpressLanes) by establishing a vision for Metro to deliver a system of Express Lanes for Los Angeles County using a network approach to maximize regional benefits.	http://libraryarchives.metro.net/DB_Attachments/170111_Strategic_Plan_with_Appendices.pdf
ExpressLanes Tier 1 Network	Metro will be working to implement the ExpressLanes Tier 1 network over the next 10 years.	
TAP Card Integration and TapForce	Metro is making progress towards completion of TAP integration across a network of transportation services, including TapForce and TapWallet.	https://boardagendas.metro.net/board-report/2017-0775/
Mobile app with trip information and fare payment for all mobility services	Metro is working on a new app that will allow for customers to plan and pay for trips using the app.	https://boardagendas.metro.net/board-report/2017-0272/
Low Income Fare is Easy (LIFE) Program	Metro launched its LIFE program in early 2018.	https://boardagendas.metro.net/board-report/2017-0813/
Customer Experience Plan and CEO’s Ridership Initiatives Progress Report	On June 21, 2018, the Board of Directors approved Motion 38 requesting staff to develop an Annual Customer Service and Experience Plan. Part of the Plan will include the status, accomplishments, objectives and challenges of Customer Service and Experience projects, beginning with the CEO Ridership Initiatives that were introduced to the Board in May 2018.	https://boardagendas.metro.net/board-report/2018-0668/
First Last Mile	The Plan is an approach for identifying	https://www.metro.net/pr

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Strategic Plan & Planning Guidelines	barriers and planning and implementing improvements for the first/last mile portions of an individual's journey.	objects/first-last/
Active Transportation Strategic Plan	The Active Transportation Strategic Plan (Plan) is Metro's county-wide effort to identify strategies to increase walking, bicycling and transit use in Los Angeles County.	https://www.metro.net/projects/active-transportation-strategic-plan/
Systemwide Station Design Standards Policy and Transfers Design Guidelines	Metro's Systemwide Station Design Standards guide all current and future Rail and Bus Rapid Transit (BRT) station designs to create a quality customer experience. The Systemwide Station Design raises the bar on station architecture, establishing a distinct unified identity for a world-class transit system.	https://media.metro.net/projects_studies/tod/images/approved_boardreport_systemwide_station_design_standards_policy.pdf
Transit Oriented Communities Demonstration Program and Transit supported planning programs	Metro supports TOCs through a programmatic approach, which includes land use planning and community development policies that maximize access to transit as a key organizing principle and acknowledge mobility as an integral part of the urban fabric. TOCs promote equity and sustainable living by offering a mix of uses close to transit to support households at all income levels, as well as building densities, parking policies, urban design elements, and first/last mile facilities that support ridership and reduce auto dependency.	https://www.metro.net/projects/transit-oriented-communities/
Other efforts undertaken by local governments, councils of governments, SCAG, and as identified by Metro		

This is a partial list; additional relevant studies and related efforts shall be referenced and incorporated whenever applicable.

Attachment C: Relevant Documents and Related Efforts

Title	Website
“Mobility Go Zone & Pricing Feasibility: Final Report,” SCAG. March 2019.	http://www.scag.ca.gov/Documents/MobilityGoZone_Report_FINAL.pdf
“Falling Transit Ridership: California and Southern California,” UCLA ITS and SCAG. January 2018.	https://www.its.ucla.edu/2018/01/31/new-report-its-scholars-on-the-cause-of-californias-falling-transit-ridership/
Measure M Final Guidelines and Program Management Plan	http://theplan.metro.net/wp-content/uploads/2017/07/guidelines_measurem_2017-0714.pdf
LA Metro Customer Satisfaction Survey 2017 Results	http://media.metro.net/about_us/vision-2028/Report_2017_Customer_Survey_Final_2018-0103.pdf
“Pricing Roads, Advancing Equity,” by Stuart Cohen and Alan Hoffman. TransForm. 2019.	http://www.transformca.org/transform-report/pricing-roads-advancing-equity
Seattle DOT Transportation Equity Program	https://www.seattle.gov/transportation/projects-and-programs/programs/transportation-equity-program
San Francisco Muni Service Equity Strategy	www.sfmta.com/projects/muni-service-equity-strategy
“How Fair is Road Pricing? Evaluating Equity in Transportation Pricing and Finance,” Brian Taylor, PhD. Bipartisan Policy Center. 2010.	https://bipartisanpolicy.org/wp-content/uploads/sites/default/files/BPC%20Pricing%20EquityFIN.pdf
“Equity of Evolving Transportation Finance Mechanisms Special Report 303,” Transportation Research Board. 2011.	http://onlinepubs.trb.org/onlinepubs/sr/sr303.pdf
“Assessing the Environmental Justice Effects of Toll Implementation or Rate Changes: Guidebook and Toolbox,” National Cooperative Highway Research Program (NCHRP). 2018.	https://www.nap.edu/catalog/24991/assessing-the-environmental-justice-effects-of-toll-implementation-or-rate-changes-guidebook-and-toolbox

This is a partial list; additional relevant studies and related efforts shall be referenced and incorporated whenever applicable.

Attachment D: Audiences

Metro will inform and engage a diversity of stakeholders with particular care to include the traveling public; Metro customers who use the agency’s portfolio of services; community-based organizations; faith-based institutions; the business community, including employers and freight industry representatives; labor organizations; transportation and transit advocates; and groups who serve the underrepresented populations in LA County. This would ensure a broad reach as well as obtain the most comprehensive input possible from diverse stakeholders. The Contractor may recommend additional audiences. Broadly speaking, the target audience for engagement fall into three categories, which at times may overlap:

- 1) The general public
- 2) Communities, including residents, workers, and businesses, directly affected by a pricing program
- 3) Other key stakeholders, which include, but not limited to:
 - Metro Customers
 - Metro Board of Directors
 - Metro advisory groups, including, but not limited to: Technical Advisory Committee and subcommittees, including Bus Operations Subcommittee, Local Transit Systems Subcommittee, Streets and Freeways Subcommittee; Policy Advisory Council; Accessibility Advisory Committee; Citizens Advisory Council; Aging & Disability Transportation Network; Transportation Business Advisory Council (TBAC)
 - Metro Service Councils
 - Advocacy organizations
 - Business associations: Los Angeles Area Chamber, Central City Association, Valley Industry & Commerce Association, San Gabriel Valley Economic Partnership, Local Chambers
 - Business community, including employers and freight industry representatives
 - Civic and governmental organizations, such as Southern California Association of Governments (SCAG), Caltrans, California Transportation Commission (CTC), Federal Highway Administration, departments of public health, auto clubs, academic community, Natural Resources Defense Council (NRDC)
 - Community based organizations
 - Commuter Association
 - Councils of Governments and other related sub-regional agencies
 - Educational institutions: K-12 School Districts, Community Colleges, Universities
 - Faith-Based Institutions and Metro’s Inter-Faith Council
 - Jurisdictions and elected officials (federal, state, county, city)
 - Labor organizations
 - Medical Health Center Providers
 - New mobility providers, such as Uber, Lyft, Bird, Lime
 - News media (print, broadcast, web, social)
 - Partner/Governmental agencies (county, state, and federal organizations)
 - Social equity and environmental justice groups
 - Tourism Related Organizations: LA Visitors and Convention Bureau, Hollywood Chamber
 - Transit providers (municipal and local operators, regional rail, Metrolink, paratransit, DASH, and others)

Attachment E: Proposed Advisory Panels

Metro proposes to develop two advisory panels associated with the Congestion Pricing Feasibility Study (Study). These are as follows:

Panel 1: Users of the Transportation System

This panel is intended to ensure that as Metro conducts the Study, we are bringing users of the system in to learn about it and react to it regularly.

- **Types of Participants:** Comprised of local residents and users of the transportation system, including people who use transit, walk, bicycle, drive, transport goods, use other modes, with representation from across the region.
- **Roles of participants:** Provide ongoing guidance and advice to ensure that the congestion pricing program addresses the needs of the transportation users and maximizes benefits
- **Recruitment:** Established through the Congestion Pricing Feasibility Study Communications and Public Engagement Contractor (Contractor) to ensure the group is representative of the region's diverse population. The panel may consist of 20-30 representatives. Consideration will be given to age, cultural and gender identity, income, geography, and mode of transportation.
- **Level of commitment:** Participate in workshops, meetings, and in person and online engagements. Participants will be compensated through a stipend and they may choose to waive it.
- **Notes:** If necessary, refreshments, travel, translation/interpretation services, and childcare service will be provided to ensure these participants can conveniently participate in this process.

Panel 2: Stakeholders

This panel would be composed of representatives from major regional stakeholder groups representing organizations across four constituency groups. The categories include the following (numbers approximate):

- 1) **Transportation Consumers** (2 representatives) – Representatives from groups who use or would be impacted by our complex transport system and a congestion pricing program. Consumers comprise a diverse coalition representing the interests of disadvantaged communities; older adults; individuals with disabilities; students; business and small business; labor; social justice organizations; representatives in the social equity community with a focus on social justice, low-income communities and the environment. We encourage Consumer representatives to network and work collaboratively through partnerships with other like organizations in order to maximize participation and input in the process.
- 2) **Transportation Providers** (2 representatives) – Those who supply or regulate transportation infrastructure and services. Providers represent a wide range of agencies and organizations that play a pivotal role in the provision of transportation/transport and planning services. This includes representatives from municipal and local transit operators, ports, airports, private providers (e.g., ridehailing companies), Caltrans, etc. It is important that these

Attachment C: Statement of Work – Technical Services – Congestion Pricing Feasibility Study

representatives keep their constituencies informed and seek input from key stakeholders within their organizations and keep their counterparts informed and seek their input.

- 3) **Government** (3 representatives) – Representatives of agencies accountable to the needs of consumer and provider constituencies that directly control public right of way or work on issues that intersect with transportation and a congestion pricing program.
 - 4) **Academia/Nonprofit** (3 representatives) – Researchers and academic professionals with experience in road usage charging, mobility pricing, and specific expertise on equity.
- Roles of participants: Provide ongoing guidance and advice to ensure that the congestion pricing program addresses the needs and concerns across the region’s diverse stakeholder groups, captures the tremendous opportunities and synergies across constituencies and interests, and leverages the participant’s network of contacts to expand the reach of the study. Members do not represent their individual organization on the advisory panel, but rather the constituency related to the seat.
 - Recruitment: Identified and selected through an open application process initially. For categories that are not fully represented through the application process, Metro and its Contractor will reach out to individuals in those categories to invite participation. The panel will consist of approximately 10 representatives. Selection criteria include individuals who can best respond to the following:
 - 1) Describe how you are uniquely qualified to fulfill the responsibilities and requirements of the Advisory Council representative role.
 - 2) State the nature and breadth of the network/outreach at your disposal.
 - 3) Describe your relevant experience and knowledge of the subject matter.
 - 4) Optional: Provide personal/professional references related to your responses from #1-3 above.
 - Level of commitment: Participate in meetings and workshops during the initiation of study, major milestones, and recommendations. The Study Team will also be available to meet one-on-one with participants outside of established meetings and workshops upon request.
 - This advisory panel is convened to provide Metro with a venue to hear and learn diverse perspectives as the Study gets underway. Beyond the advisory panel, Metro anticipates that many additional stakeholder groups and individuals will be interested in participating in this process and will provide additional opportunities for those stakeholders to participate through other means and forums.

OEI Advisory Board

In addition to the panels above, the Office of Extraordinary Innovation (OEI) Advisory Board has already been established. This Board already includes some experts on congestion pricing, but OEI will add to that knowledge by bringing in a few more people from beyond California, and creating a Congestion Pricing subcommittee.

- Comprised of representatives from peer agencies and academia with experience in road usage charging and mobility pricing.

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- Roles of participants: Provide independent perspectives on the conceptual and practical aspects of proposals under consideration.
- Recruitment: Use existing OEI Advisory Board and add additional members based on Metro's network of contacts of congestion pricing researchers and peer agencies.
- Level of commitment: Participate in meetings during the initiation of study, major milestones, and recommendations.

Note: For participants traveling from out of town, a travel stipend will be provided and they may choose to waive it.

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

STATEMENT OF WORK – COMMUNICATIONS AND PUBLIC ENGAGEMENT CONGESTION PRICING FEASIBILITY STUDY

INTRODUCTION

The Los Angeles County Metropolitan Transportation Authority (Metro) is seeking a qualified firm to conduct stakeholder and public engagement for a Congestion Pricing Feasibility Study (Study or Project). The Contractor shall support Metro to develop and implement a comprehensive and robust Stakeholder and Public Engagement Plan that supports the goals of the Study. Metro encourages innovative, effective, and creative approaches that engage the diverse communities of Los Angeles County, with special attention to historically underserved and disadvantaged populations. In addition, the approach shall engage targeted stakeholders as well as the general public in re-imagining a transformative, high-quality mobility future. This future will be enabled by a pricing strategy and other actions Metro will be undertaking to create a world-class transportation system, as described in the agency's 10-year strategic plan, Vision 2028. (This document can be accessed at metro.net/vision2028). In addition, the Contractor needs to fully understand the technical work and phases of the tasks involved that will be conducted by the technical contractor, which is under a separate contract. See Attachment A for the Request for Proposal technical scope of services for the Study. The Communications and Public Engagement Plan shall be consistent with Metro's Equity Platform Framework (See Attachment B) and comply with Title VI and environmental justice directives (See Attachment C). The Contractor shall coordinate with concurrent efforts undertaken by Metro, including, but not be limited to, those listed in Attachment D and relevant documents in Attachment E.

Metro serves as regional transportation planner and coordinator, designer, builder, funder, and operator for one of the country's largest, most populous counties and employs approximately 10,000 full-time staff. Approximately 10 million people live, work, and play within its 1,433-square-mile service area. In 2017, LA County welcomed 48.3 million visitors, which was record breaking, and 50 million visitors are anticipated in 2020.

BACKGROUND

Los Angeles County is currently home to more than 10 million people and its population is projected to grow to 10.75 million by 2028. This means that an increasing volume of people and goods will need to travel on a transportation network that is already inadequate in serving their needs. Overall consumption in the region is expected to intensify the conflicts between passenger and goods movement. Optimizing system capacity to accommodate new growth will be necessary to ensure that the region can meet these new demands and remain economically competitive in the global marketplace. Significant investments are needed, both to shore up an aging system of roadway and transit infrastructure, as well as to expand and fully utilize available capacity to ensure continued delivery of safe and reliable transportation services.

Historically, transportation policies and investments in LA County have prioritized single-occupancy travel in private passenger vehicles at the expense of providing other high-quality travel alternatives. The result is an inequitable transportation system that exacerbates the divide between those who have the access and means to drive and those who do not, while providing inadequate options for both groups. This system is not sustainable from an economic or environmental perspective. As more people turn to driving alone for speed and convenience, mobility and air quality for all individuals suffer due to the inefficient use of existing roadway space. Changing this paradigm and raising the quality of multiple transportation options is essential to delivering a system that provides better mobility for everyone. This means investing in high-quality transit options that can carry more people in less space, creating

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

incentives to reduce solo driving, providing other quality multimodal options, and removing incentives that further exacerbate transportation inequities. Metro seeks to align its policies and investments across its portfolio of programs and services to provide more high-quality transportation options for people and, equally important, effectively manage demand from all users.

Metro is studying congestion pricing as a transformational approach to address the widely shared desire to genuinely reduce congestion, improve mobility and air quality, improve equity, and ultimately provide a more sustainable and resilient LA County for all. The Congestion Pricing Feasibility Study will investigate the feasibility and framework for conducting a congestion pricing pilot program with the intent to expand the program in the most traffic-clogged parts of LA County, upon approval of the Metro Board of Directors. The Study will include extensive, comprehensive, and genuine community and public engagement throughout the process.

PROJECT OBJECTIVE

The objectives of the Study include:

- To investigate the feasibility and framework for testing and implementing pricing strategies to reduce traffic congestion and to dramatically improve equity, mobility, and environmental outcomes
- To extensively, comprehensively, and genuinely engage stakeholders and the public in this Study process to help solve the traffic problems in Los Angeles County and develop widespread support for a pilot program
- To identify location(s) for a pilot program and establish an implementation plan

The Contractor shall provide communication services for stakeholder and public engagement for the Congestion Pricing Feasibility Study. All deliverables rendered under this contract shall be in accordance with each task description outlined under the Scope of Services.

PROJECT MILESTONE SCHEDULE

The performance period for the Congestion Pricing Feasibility Study shall be up to 24 months from the Notice to Proceed. The Contractor shall propose a realistic and effective project milestone schedule and timeline that meet the intent and outcome of this scope of services and take into consideration the technical work, which is under a separate contract.

Milestone	Anticipated Completion
Start of work/kickoff	Upon contract award
Project Management Plan submitted to Metro	Two weeks after contract award
Draft Communications and Public Engagement Plan submitted to Metro	Four weeks after contract award
Final Communications and Public Engagement Plan submitted to Metro	Six weeks after contract award
Completion of Congestion Pricing Feasibility Study	Up to 24 months after contract award

Note: All dates and timelines are tentative and subject to change.

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MINIMUM QUALIFICATIONS

Minimum qualifications are required for a Contractor to be eligible to submit a proposal response. Your submittal response must show compliance to these minimum qualifications. Those that are not responsive to these qualifications shall be rejected by Metro without further consideration:

- Key project team members have demonstrated expertise and a minimum of five years of experience working on stakeholder and public engagement strategies that have resulted in successful implementation of congestion pricing, tolling, or programs that use pricing to manage demand in transportation
- Key project team members who understand the local and regional political landscape and the transportation context of Los Angeles County and have stakeholder and public engagement experience in Los Angeles County
- Key project team members with background and experience in conflict resolutions around contentious issues
- Key project team members with knowledge and experience in environmental and social justice issues, with background and experience working in and with environmental justice communities

GUIDING PRINCIPLES

To ensure the Congestion Pricing Feasibility Study process is inclusive of Los Angeles County's diverse communities, needs, and aspirations, Metro has established the following Guiding Principles for this work effort:

- Openness to creativity and innovation.
- Extensive public input and outreach, as directed by Metro, to ensure buy-in and understanding of opportunities and tradeoffs with key decision makers, municipalities, other key stakeholders, and to be inclusive of LA County's diverse communities.
- Acknowledgement of Metro's fiscal constraints and the Agency's role as stewards of public funds.
- Outreach and engagement strategies that reach all nine sub-regions of LA County and reflect the diverse communication needs of the region.
- Materials and engagement opportunities conducted in languages appropriate to the communities we serve.
- Targeted outreach implemented through grassroots organizations and partnering with community-based organizations, faith-based organizations, and other relevant groups.

The Contractor shall ensure that their work plan is reflective of and demonstrates how they will adhere to the above Guiding Principles and integrate them into their proposed work plan.

SCOPE OF SERVICES

The scope of services for the Congestion Pricing Feasibility Study is divided into two components:

- Communications and Public Engagement Plan and Implementation Services (Under this RFP)
- Technical Services (Under a separate RFP)

The Proposer may offer a response to Metro's Request for Proposal (RFP) for one or both of these project components. While Metro recognizes that selecting one contractor team for both components may provide attractive efficiencies, it also aims to secure the most-qualified assistance for this Project. A contractor team proposing a response for both components may be asked to participate in two separate interviews, as appropriate.

Throughout this Project, work activities and analyses shall be coordinated and integrated

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across the parallel activities related to the two project components: A) Communications and Public Engagement Plan and Implementation Services and B) Technical Services (under a separate contract). The Contractor shall ensure that major overlaps are coordinated. Whether proposing on one or both components, the Contractor shall clearly identify major overlaps and identify how those will be addressed.

The performance measures by which the Contractor shall be measured will include the following:

- Number of people engaged over time
- Increasing support from stakeholders/public over time (e.g., letters of support, public sentiment tracking)
- Socio-economic diversity of people and groups engaged throughout the course of the Study

PART 1 – CONGESTION PRICING FEASIBILITY STUDY

Task 1: Project Administration, Management, and Coordination

Task 1.1 General Project Administration, Management, and Coordination

The Contractor shall provide management and any necessary staff to plan, organize, direct, supervise, control, and coordinate the administrative aspects of the Project, including contract and subcontract administration, accounting/invoicing, office services, and personnel administration.

The Contractor shall closely communicate with Metro's Project Manager (PM) and designee and provide updates to the Project weekly, biweekly, or as needed and during key milestones; provide dates, times, and locations of upcoming key meetings; identify issues that may impact the Project's implementation or schedule; and recommend and implement actions to keep the Project on schedule and budget.

The Contractor shall establish a method to identify potential cost overruns and maintain project budget. The Contractor shall be responsible for overseeing quality control and ensuring that all deliverables are in line with Metro's requirements. The Contractor may be part of a project team consisting of other outside Contractors, Metro cross-departmental representatives, partner organizations, and third party stakeholders and shall work collaboratively and effectively within this team environment.

The Contractor shall develop a Project Management Plan that includes, at minimum, project meeting schedule, a detailed breakdown of the project costs by task/subtask, a detailed staffing plan by task/subtask, organizational chart, a detailed schedule for each work task/subtask and an overall work flow chart identifying critical work path items. The Project Management Plan shall provide the basis by which the project status will be measured and shall include methods to identify potential cost overruns and maintain project budget.

All reports, memoranda, and documents identified as deliverables in this and subsequent tasks shall be sent electronically to Metro's PM. The Contractor shall closely communicate with Metro's PM and provide updates, which may include teleconference or in-person meetings with Metro.

Deliverables:

- a. Arrange, schedule, and staff necessary meetings and coordination and provide logistical support where necessary
- b. Draft and final Project Management Plan

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

Task 1.2 Project Status Meetings

The Contractor shall participate in project status meetings with Metro's PM and representatives from Metro's Communications Department (e.g., Marketing, Community Relations, Public Relations) on a weekly basis during the initial phase of the Study and then on an as needed basis during the remainder of the contract period to discuss and coordinate communication-related activities. The Contractor shall prepare agendas in consultation with Metro's PM. Meeting agenda draft shall be provided to Metro's PM at least two business days prior to the meeting. The Contractor shall provide meeting summary, including action items, to Metro's PM within two business days after the meeting.

The Contractor shall also participate in project status meetings with Metro and the Technical Contractor bi-weekly or as needed for the duration of the contract to coordinate overall project-related activities. The agenda for these meetings shall be prepared by the Technical Contractor, which is under a separate contract, in consultation with Metro's PM.

The purpose of the meetings shall be to coordinate work activities; refine assessment methodology; identify strategies, as necessary, for CEQA compliance; report and document project status; discuss and identify any unforeseen issues; highlight problems and corrective measures; recommend action plans proposed to keep project on schedule and budget; discuss any work products; prepare for advisory panel and other outreach meetings; and present next steps.

Deliverables:

- a. Meeting agenda and summary, including action items, in electronic Microsoft Word format. Meeting agenda draft shall be provided to Metro's PM at least two (2) business days prior to meeting. Meeting summary shall be provided to Metro's PM within two (2) business days after meeting.
- b. Project meetings with Metro
- c. Project meetings with Metro and the Technical Contractor

Task 1.3 Online Electronic Document Repository

The Contractor shall provide a secure online electronic document repository for the duration of the contract. The Contractor shall provide an index file and table of contents for ease of document access. The repository shall be updated within two (2) working days of the distribution of the deliverable. All printed deliverables submitted shall have a corresponding electronic file submitted to this repository as a controlled document, unless otherwise indicated by Metro's PM. Upon completion of the Project or at the request of Metro, all contents shall be transferred to Metro. The Contractor shall work with Metro's PM on the organization of the repository and contents to be stored and uploaded. The Contractor shall update and maintain the repository for the duration of the contract. The Contractor shall use existing software or tools that are readily available on the market, rather than creating new software to perform this task.

The purpose and functionality of the repository shall include, but is not limited to:

- Consolidation, search, storage, browsing, retrieval, and version tracking of all deliverables.
- Ability to store related files (e.g., comment/review files, attachments, etc), with no limits on file size.
- Allows Metro to establish accounts for others to view the materials, through a secure system that supports varying levels of privileges, permissions, or other account configuration options as needed to control access rights. Also allows Metro to adjust these privileges, permissions, or other account configuration parameters on demand.
- Allows Metro to provide formal digitally signed acknowledgement of acceptance of those deliverables as instructed by Metro.

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- Allows for nested folder structures for file organization.
- Supports the storage and display of extended metadata including: Title/Subtitle, Date, Authors, Contact Information for Authors, Contract number, Type of deliverable (draft, final, etc), Abstract, Distribution Statement (e.g., restricted, unrestricted), number of pages.
- Contain documentation related to this Project, including, but not be limited to, the Contractor's Project Management Plan, Communications and Public Engagement Plan, key correspondence, reports, maps, photos, videos, graphics, project deliverables, key contacts, etc.

Deliverables:

- a. Set-up and maintain a secure, online repository; training materials; and user guide.

Task 1.4 Support Metro's Salesforce Customer Relationship Management Tool

The Contractor shall provide support to help Metro manage its Salesforce Customer Relationship Management tool for this Project. Metro already has access to the Salesforce Customer Relationship Management tool. The tool is intended to help coordinate and manage external interactions and relationships, manage large contact lists, send e-blasts to specific groups, conduct data analytics, create customer profiles to develop or target services, and other tasks.

Task 2: Conduct Stakeholder and Public Engagement, Outreach, and Market Research

The objectives of this task include:

- Establish grass-roots and widespread support for a pilot program
- Identify stakeholders, individuals and organizations, to engage
- Establish multiple forums and methods for meaningfully engaging with stakeholders and communities, such as in-person and virtual meetings, pop-ups, social media platforms, surveys, and a variety of other methods specific to the context and needs of different communities
- Inform project development and implementation of a pilot program

The Contractor shall work with Metro to recommend, prepare, and execute a comprehensive strategy to listen, inform, and engage stakeholders and the general public in order to achieve the objectives of the Project. Particular care should be taken to include the traveling public; Metro customers who use the agency's portfolio of services; community-based organizations; faith-based institutions; the business community, including employers and freight industry representatives; labor organizations; transportation and transit advocates; and groups who serve the underrepresented populations in LA County. This would ensure a broad reach as well as obtain the most comprehensive input possible from diverse stakeholders. Attachment F includes the categories of audiences that will be included in this process. The Contractor may recommend additional audiences. When applicable, the Contractor shall provide refreshments, translation/interpretation services, and childcare service to ensure that participants can conveniently participate in the process.

2.1 Gauge Public Opinion

The contractor shall conduct public opinion polling at strategic iterations throughout the Project to gauge levels of public awareness and support of congestion pricing and other topics to help inform the development and implementation of an effective pilot program. This may include focus groups, surveys, or other means, which may be conducted by phone, in-person, and/or online. The Contractor may recommend other creative, effective, and innovative strategies to collect information and analyze data to capture the intent of this task.

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

2.2 Conduct Stakeholder and Public Engagement

The Contractor shall recommend and conduct, with Metro’s approval, innovative, effective, and creative approaches that engage the diverse communities of Los Angeles County, with special attention to historically underserved communities. In addition, the approach shall engage targeted stakeholders as well as the general public in re-imagining a transformative, high-quality mobility future, one that can be enabled by a pricing strategy and other actions Metro will be undertaking to create a world-class transportation system, as described in Vision 2028. The Contractor is encouraged to think creatively and innovatively about how best to present concepts in an engaging way that is easy to understand and identify with lived experiences. The Contractor shall work closely, collaboratively, and effectively with the project team to ensure that information, analysis, and findings are closely shared and used iteratively to inform stakeholder and public engagement.

Advisory Panels

The Contractor shall help Metro establish, recruit, staff, and facilitate advisory panels associated with the congestion pricing initiatives. See Attachment G for more information. The Contractor may recommend supplemental approaches. The Contractor shall plan and oversee meeting logistics. The Contractor shall be responsible for providing the necessary, travel, translation/interpretation, refreshments, and childcare services to ensure that participants can conveniently participate in this process. The Contractor shall provide support to the Technical Contractor, who will be leading the preparation of the presentation materials and content for the advisory panel meetings. The Contractor shall assist in the development of materials, visual information, and activities to help facilitate understanding, comprehension, and engagement with the target audience, to get meaningful input, and to inform the path forward.

Support Development of Equity Strategy

In collaboration with the Technical Contractor, the Contractor shall support development of an equity strategy to:

- Understand population groups, modes (including freight), and geographies that would be affected by different pricing models;
- Assess the potential negative and positive impacts of a congestion pricing strategy on historically underserved or disadvantaged populations, as it affects their mobility access to jobs, housing, and other opportunities; and
- Assist Metro in developing an equity strategy for congestion pricing to improve outcomes for underserved or disadvantaged populations.

As a reference, see the 2019 study published by TransForm called *Pricing Roads, Advancing Equity*. In collaboration with the Technical Contractor, who will be leading the equity impact assessment, the Contractor shall engage disadvantaged populations and those who represent such groups to seek meaningful input throughout the duration of the Project. These will include looking at both minimizing negative and disproportionate impacts of the proposed congestion pricing approach as well as considering the opportunities to use road pricing to redress systemic inequities across targeted communities. The Contractor shall establish partnerships with community-based organizations (CBOs) throughout the duration of the Project to reach targeted communities. Given the limited staffing and resources of such organizations, the Contractor shall budget for stipends and other necessary compensation to ensure that partnerships with these CBOs are mutually beneficial. When applicable, the Contractor shall coordinate with Metro’s CBO Partnership Strategy, which is currently in the early stages of development.

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2.3 Conduct Public Education and Engagement

The Contractor shall develop and implement a strategic public education campaign to help the public re-imagine a transformative mobility future. The campaign shall be targeted, compelling, resonate with different audiences, and may be informed by information from Tasks 2.1 and 2.2. Such campaign may include, but not be limited to, online strategies, social media, news media, tactical urbanism, visualizations, or other creative means that can reach a wide audience reflective of the diversity of the Los Angeles region.

Deliverables:

- a. Draft and final memo summarizing methodology and approach for conducting public opinion polling, analysis, and findings
- b. Draft and final Communications and Public Engagement Plan
- c. Recruitment plan for advisory panels; participant rosters
- d. Partnership agreements with community-based organizations
- e. List of contact information of individuals, organizations, and targeted audiences
- f. Collateral materials; presentation templates; digital graphics for PowerPoints, newsletters, e-blasts, and webpages; digital communications; project website and social media tools; and other materials and tools
- g. Summary documentation of outreach meetings/workshops conducted
- h. Summary documentation of public comments and feedback at project milestones and decision points
- i. Draft and final Public Education and Engagement Plan, summary of analytics and campaign effectiveness, including performance measures

3: General Support

The Contractor shall provide the following support, as needed:

- **Copywriting, Copying, Printing and Mailing Support** in consultation with Metro PM and Communications staff, the Contractor shall develop copy, messages and text for both print and electronic informational and outreach materials including, but not be limited to, fact sheets, frequently asked questions, take-ones, brochures, posters, blog posts, and flyers.
- **Community meeting logistics, planning, and facilitation**, including public comment tracking for in-person and web-based meetings and supporting Metro's efforts to conduct telephone town hall meetings.
- **Development of Graphic Design, Photography, Digital and Video Production** by providing content for populating Metro-provided templates or develop content consistent with Metro guidelines.
- **Digital, graphical, map, photo and video editing and strategies** to enhance public participation and engagement.
- **Special event planning and outreach** staffing as needed for special events, community events, and festivals.
- **Door-to-door canvassing and literature distribution.**
- **Multi-ethnic/multi-lingual interpretation and translation services.**
- **Targeted outreach support** to community groups and stakeholders to reach and engage diverse audiences.
- **Innovative methods for reaching diverse community stakeholders** with activities and tools to reach a wide spectrum of stakeholders, including historically underserved communities.
- **Opinion research** in the form of public opinion research, focus groups, an online engagement tool, and online polling.

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

- **Monitor media and social media** to track public sentiment on relevant issues and reaction to any public events on the topic.

The Contractor shall detail how their team shall perform each of the support services to address the statement of services for the Congestion Pricing Feasibility Study stakeholder and public engagement effort.

PART 2 - OPTIONAL SCOPE ITEMS – IMPLEMENT A ROBUST COMMUNICATIONS AND PUBLIC ENGAGEMENT PLAN FOR A PILOT PROGRAM *Written authorization by Metro is required for this Task.

Task 4: Continuation and Updating of Part 1 Activities

Should the Metro Board of Directors authorize the implementation of a pilot program, the Contractor shall continue activities begun in Part 1. The Contractor shall submit a revised Project Management Plan and Communications and Public Engagement Plan that reflects information and input gathered to date in the Study, including:

- Revised recommendations pertinent to the new phase;
- Key areas of focus for outreach in the new phase;
- Other pertinent information; and
- Rationale for the revised recommendations.

Deliverable:

- Draft and final Project Management Plan Revision
- Draft and final Communications and Public Engagement Plan Revision

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

Attachment A: Statement of Work - Technical Services for Congestion Pricing Feasibility Study

Attachment D: Statement of Work – Communications and Public Engagement – Congestion Pricing Feasibility Study

Attachment B: Equity Platform Framework



Board Report

File #: 2017-0912, File Type: Policy

Agenda Number: 21.

**REVISED
EXECUTIVE MANAGEMENT COMMITTEE
FEBRUARY 15, 2018**

SUBJECT: METRO EQUITY PLATFORM FRAMEWORK

ACTION: ~~RECEIVE AND FILE~~ APPROVE METRO EQUITY PLATFORM FRAMEWORK

RECOMMENDATION

APPROVE Metro's Equity Platform Framework.

ISSUE

Access to opportunity should be a core objective of public decision making, public investment, and public service - and transportation is an essential lever to enabling that access. Unfortunately, there exists vast disparity among neighborhoods and individuals in Los Angeles County in their ability to see and seize opportunity - be it jobs, housing, education, health, safety or other essential facets of thriving in vibrant, diverse communities. A multi-point equity platform provides a basis for Metro to actively lead and partner in addressing and overcoming those disparities.

Metro staff does not approach the subject of equity lightly or uninformed. The adoption of Measure M included performance metrics that were tied to disadvantaged communities. The major revision to the Long Range Transportation Plan has committed to incorporating equity as a crosscutting issue since its introduction to the Board in February 2017. The Policy Advisory Council has flagged this as a major topic of interest. Most importantly, recent and engaged experience with community members with several projects (i.e., First/Last Mile planning, the Transformative Climate Communities grant for Rail to Rail, and a body of innovative workforce development initiatives) all underscore both the timeliness and urgency that equity considerations bring to Metro's portfolio. In addition, staff informally reached out to representatives from academia, foundations, advocacy organizations and local government in developing this platform. Their demonstrated experience in research and collective action, and their candid feedback on challenges and opportunities in the equity space were invaluable.

DISCUSSION

Metro's multi-point equity platform is wrapped around four pillars.

First, we need to define a common basis for talking about and building an agenda around equity, and how to improve it.

- Equity holds different perspectives and priorities for everyone and anyone who will be part of

this conversation.

- At its core, *inequity* exists when there are fundamental differences in access to opportunity, not just with respect to where you begin, but in your capacity to improve from that starting position.
- Historically and currently, race and class have largely defined where these disparities are most concentrated: in poor, minority communities throughout LA County. Age, gender, disability, and residency also can expand or constrain opportunities.
- It would be presumptuous to begin a truly inclusive conversation with a pre-determined definition of “equity” and all its facets, but Metro can enter into that conversation committing to the following:
 - Establish meaningful goals around a shared definition of equity and actions to achieve those goals.
 - Define metrics to evaluate outcomes and consider redirected actions if needed. It will be particularly critical to infuse equity-based performance metrics in Metro’s investment decisions. These cannot be the only investment considerations. Transportation is rife with tradeoffs. But equity metrics need to be definable, impactful, measurable, accountable, and at the front end of the analysis, not the back end.
 - Seek and invite the diverse range of voices that must participate with Metro in accomplishing the above. Importantly, we need to proactively reach out to those who have remained on the margins of decision-making in the past. These will include historically underserved communities and organizations that represent them. But we must also reach out and hear voices that may not be aligned with established groups.

Second, Metro needs to establish comprehensive, multiple forums to engage the community meaningfully and actively in pursuit of the first step discussed above. An important opening conversation with LA’s community members would address: a) where they believe achieving equity has been problematic - broadly, and specific to transportation’s role; and b) where improved relationships, partnerships and actions aligned with Metro’s portfolio of responsibility can be defined to advance more equitable transportation outcomes going forward.

- This will be a challenging conversation, insofar as it requires the Metro as Board and staff to invite the community to articulate where it has experienced, in fact deeply felt, inequity in Metro’s past. This isn’t a platform for Metro to defend or be defensive; people feel what they feel, and it is going to be impossible to define a new path and build a different position of trust if past experience is not given voice and legitimacy.
- That said, the main point of this conversation forum should be to learn and move forward based on that acknowledgement. This may require reconciling divergent opinions to arrive at some shared goals and actions. Actions going forward may redress past ills - that is to be determined - but they certainly should not repeat them, if at all possible. It is also an opportunity to discuss with community members those initiatives where Metro has actively tackled disparity gaps, such as its growing portfolio of workforce development initiatives.
- Advice and best practices on how to effectively have these community-driven conversations

will be key.

- Metro can start with lessons learned from other cities across the country. San Francisco, Seattle, Oakland and others all have models to tap.
 - These forums would benefit from professional facilitation. Foundations have established several venues that Metro might pivot from (e.g. the on-going national Strong, Prosperous and Resilient Communities Challenge (SPARCC) Initiative includes Los Angeles as a participating city - LA Thrives coalition is the local lead; the California Endowment and others have underwritten numerous initiatives across the County); or seek new support.
- As noted at the outset, Metro consulted with equity thought leaders whose advice informed the core of this platform. Retaining this cross-sectional consultation will be critical to successfully implementing a platform that requires dedication and time. In particular, the community forums envisioned will benefit from a circle of demonstrated leaders. We certainly don't hold all the keys on issues, and making use of the rich resources around us is essential.
- A key step will be to establish a formal or informal advisory group supporting the equity platform, and to incorporate, as appropriate, the equity agenda into existing advisory groups.
- In addition, the following initiatives are also suggested:
- Actively develop and invest in a Community Based Organization (CBO) oriented public engagement program. This approach may not be applicable to every Metro investment, program or activity located in, or otherwise impacting, LA County's historically underinvested (HU) communities. As stated above, we must be mindful that any single group does not represent all voices in every community. However, this approach should be added to and implemented as part of our public process, if we are going to establish and maintain legitimacy within impacted communities when addressing equity issues that they themselves are experiencing directly.
 - Invest in the transportation technical capacity of local governments that serve HU communities. Metro cannot and should not be the sole partner in all transportation or transportation-impacted decisions, legally or practically. And traditional funding and regulatory programs in particular assume effective participation by local jurisdictions. In short, strengthening cities that are home to equity communities is probably a core requirement for a more equitable County. This assistance can range from delivering transportation improvements swiftly and effectively to competing for discretionary funding more successfully; to better supporting more community-inclusive decision-making around transport investments.

Third, the Long Range Transportation Plan (LRTP) must have a concentrated focus on equity. There are two major arenas for that focus to take root.

Where Metro **Leads**

- First and foremost, we must tackle impacts of the LA County's transportation system under our

direct responsibility via Metro's role as transportation planner, operator, builder and funder. As such, equity is a "cross cutting" principle that will be applied throughout the LRTP's development, as reported to the Board in prior presentation's on the Plan's design and rollout.

- Critically, what we choose - or do not choose - to invest in that system is paramount. Over the 40-year span of the LRTP, a considerable amount of funding controlled by Metro is legally or legislatively dictated, such as Measure M. It should be noted that equity related factors were considered as part of the 5 performance measures developed to assess and prioritize Measure M's expenditure plan projects. Specifically, the "Economy" and "Sustainability/Quality of Life" themes included metrics attached to investments in disadvantaged communities. But while there are important additional equity considerations Metro can assess as projects are implemented, there are practical limitations to rethinking or redirecting certain funds that are statutorily prescribed.

However, a significant amount of funding in the long range plan is not yet locked down for 40 years, allowing us to reassess current patterns of investment and either reaffirm them or change them.

- These investment decisions should be based on performance outcomes and, as presented here, front and center considerations should be given to those that actively:
 - advance outcomes that promote and sustain opportunities in underserved communities; or
 - avoid outcomes that lead to or aggravate disparities in opportunity in those communities.
- Notably, investments must be made to operate, maintain and rebuild the existing transportation system, in addition to expanding it. The community's ability to access that transportation system - where, when, how, and at what cost - impacts their opportunities to jobs, housing, education and health. Thus, measuring equity against that access, and for whom, is central to our planning process.
 - In this realm, there will be several, discrete transportation activities that will be developed alongside the LRTP where equity will be front and center: any discussion of "right sizing" fares, redesign of the Metro bus system, our continuing work in Work Force Development and small business support, to name a few.
 - The Long Range Transportation Plan will not duplicate analysis and recommendations in these areas. It will incorporate goals, decisions, and any actions attached to all of them, and will likely help facilitate equity-driven discussions in each of them.
 - These issues address critical transportation access concerns, and will be important venues for coordinating community involvement.

Where Metro **Partners**

- Beyond its core transportation responsibilities, there will be an expectation to take on a new, countywide, visible equity challenge: the Metro transport system's interface with gentrification/displacement/affordable housing.

- Neighborhoods throughout the county are facing escalating housing costs, real estate developments that are reshaping community culture, and in both cases, frequently forcing existing residents into painful relocation or transportation decisions. Gentrification/displacement/affordable housing is a common thread of concern among elected officials and advocates. And it hits every corner of the County.
- Metro cannot address this subject by ourselves - it will require active partnerships with others, such as the County, cities, Council of Governments, private sector and business as well as community representatives. Foundations are extremely interested in this arena and could bring valuable resources to the table.
- Among other considerations, these issues underscore the complexity of equity concerns and the necessarily complex response to them. By taking up a big problem - but not Metro's problem alone - it gives us the space to explore, experiment and advance change while building necessary partnerships at the outset.

Fourth, we need to pursue equity training within Metro. Successfully setting and delivering on a new equity agenda requires "top to bottom" ownership throughout the agency.

- In recent years, there has been a growing body of equity training designed for governmental agencies. LA County departments have deployed these programs, among others. We intend to explore options and commit to internal education that would be required at certain levels and positions.
- Training would be in two important areas:
 - Methods to evaluate equity including data collection, measurement and analysis; and
 - Approaches to effectively communicate and work with communities in a manner that recognizes and respects equity issues.

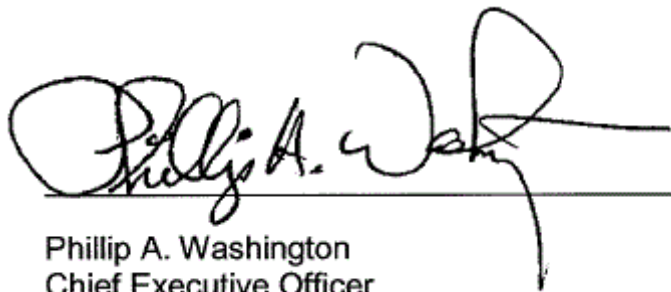
This platform is a starting point, and should be considered a working outline that can be adjusted with experience and feedback. The commitment expressed herein, however, should be a guiding constant - for Metro, our transportation partnerships, and the people we serve.

NEXT STEPS

Staff will proceed to use the Equity Platform as a framework for specific analyses and actions attached to Metro initiatives, as outlined in this report. Progress will be reported periodically to the Board, particularly as it relates to key plans and programs underway, such as the Long Range Transportation Plan.

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Phillip A. Washington
Chief Executive Officer

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Attachment C: Compliance with Title VI and Environmental Justice Directives

Metro's 2016 Public Participation Plan, which is currently being updated in 2019, specifies the methods, innovations and measurements of the agency's commitment to not just meet, but exceed the prescribed requirements of U.S. Department of Transportation (USDOT), including Federal Transit Administration (FTA) Circulars C 4702.1B citing recipients' responsibilities to limited English Proficient Persons, FTA Circular C 4703.1, guiding recipients on integrating principles of Environmental Justice into the transportation decision-making process, and Federal Highway Administration's (FHWA) Title VI program. The Plan is also consistent with Title VI, (non-discrimination regulations) of the Civil Rights Act of 1964, Section 162(a) of the Federal-Aid Highway Act of 1973 and The Age Discrimination Act of 1975.

The Contractor shall refer to Metro's current Public Participation Plan to ensure its proposal is consistent with the pertinent laws, regulations, policies and guidelines pertaining to minimum baseline thresholds for public outreach including informational materials, public hearings and meetings, language translations, neighborhood/community sensitivities, online language translation and other outreach activities and tools.

Attachment D: Concurrent Efforts Undertaken by Metro

Title	Description	Access Link
Vision 2028 Strategic Plan	Metro's 10-year strategic plan to improve mobility in Los Angeles County, adopted in June 2018.	https://www.metro.net/about/metro-vision-2028-plan/
Equity Platform Framework	A multi-point equity platform that provides a basis for Metro to actively lead and partner in addressing and overcoming disparity among neighborhoods and individuals, adopted by Board in May 2018, and in process for developing and adopting performance metrics.	https://boardagendas.metro.net/board-report/2017-0912/
Community-Based Organization (CBO) Partnership Strategy	Metro is developing an agency-wide CBO Partnership Strategy that will inform how Metro works and partners with CBOs on programs, projects, and initiatives. To align with Metro's Equity Platform Framework, the Strategy includes how Metro provides opportunities to qualify and bid for contracts.	
Public Participation Plan 2019 (in progress)	Metro's plan guides all of Metro's outreach to gather important public input on possible changes to bus and rail service, new projects in planning and in construction, fare and other programs.	https://www.metro.net/about/special-projects/public-participation-plan/
Customer Service and Experience Plan and CEO's Ridership Initiatives Progress Report	On June 21, 2018, the Board of Directors approved Motion 38 requesting staff to develop an Annual Customer Service and Experience Plan. Part of the Plan will include the status, accomplishments, objectives and challenges of Customer Service and Experience projects, beginning with the CEO Ridership Initiatives that were introduced to the Board in May 2018.	https://boardagendas.metro.net/board-report/2018-0668/

This is a partial list; additional relevant studies and related efforts shall be referenced and incorporated whenever applicable.

Attachment E: Relevant Documents and Related Efforts

Title	Website
LA Metro Customer Satisfaction Survey 2017 Results	http://media.metro.net/about_us/vision-2028/Report_2017_Customer_Survey_Final_2018-0103.pdf
“Pricing Roads, Advancing Equity,” by Stuart Cohen and Alan Hoffman. TransForm. 2019.	http://www.transformca.org/transform-report/pricing-roads-advancing-equity
Seattle DOT Transportation Equity Program	https://www.seattle.gov/transportation/projects-and-programs/programs/transportation-equity-program
San Francisco Muni Service Equity Strategy	www.sfmta.com/projects/muni-service-equity-strategy
“How Fair is Road Pricing? Evaluating Equity in Transportation Pricing and Finance,” Brian Taylor, PhD. Bipartisan Policy Center. 2010.	https://bipartisanpolicy.org/wp-content/uploads/sites/default/files/BPC%20Pricing%20EquityFIN.pdf
“Equity of Evolving Transportation Finance Mechanisms Special Report 303,” Transportation Research Board. 2011.	http://onlinepubs.trb.org/onlinepubs/sr/sr303.pdf
“Assessing the Environmental Justice Effects of Toll Implementation or Rate Changes: Guidebook and Toolbox,” National Cooperative Highway Research Program (NCHRP). 2018.	https://www.nap.edu/catalog/24991/assessing-the-environmental-justice-effects-of-toll-implementation-or-rate-changes-guidebook-and-toolbox

This is a partial list; additional relevant studies and related efforts shall be referenced and incorporated whenever applicable.

Attachment F: Audiences

Metro will inform and engage a diversity of stakeholders with particular care to include the traveling public; Metro customers who use the agency's portfolio of services; community-based organizations; faith-based institutions; the business community, including employers and freight industry representatives; labor organizations; transportation and transit advocates; and groups who serve the underrepresented populations in LA County. This would ensure a broad reach as well as obtain the most comprehensive input possible from diverse stakeholders. The Contractor may recommend additional audiences. Broadly speaking, the target audience for engagement fall into three categories, which at times may overlap:

- 1) The general public
- 2) Communities, including residents, workers, and businesses, directly affected by a pricing program
- 3) Other key stakeholders, which include, but not limited to:
 - Metro Customers
 - Metro Board of Directors
 - Metro advisory groups, including, but not limited to: Technical Advisory Committee and subcommittees, including Bus Operations Subcommittee, Local Transit Systems Subcommittee, Streets and Freeways Subcommittee; Policy Advisory Council; Accessibility Advisory Committee; Citizens Advisory Council; Aging & Disability Transportation Network; Transportation Business Advisory Council (TBAC)
 - Metro Service Councils
 - Advocacy organizations
 - Business associations: Los Angeles Area Chamber, Central City Association, Valley Industry & Commerce Association, San Gabriel Valley Economic Partnership, Local Chambers
 - Business community, including employers and freight industry representatives
 - Civic and governmental organizations, such as Southern California Association of Governments (SCAG), Caltrans, California Transportation Commission (CTC), Federal Highway Administration, departments of public health, auto clubs, academic community, Natural Resources Defense Council (NRDC)
 - Community based organizations
 - Commuter Association
 - Councils of Governments and other related sub-regional agencies
 - Educational institutions: K-12 School Districts, Community Colleges, Universities
 - Faith-Based Institutions and Metro's Inter-Faith Council
 - Jurisdictions and elected officials (federal, state, county, city)
 - Labor organizations
 - Medical Health Center Providers
 - New mobility providers, such as Uber, Lyft, Bird, Lime
 - News media (print, broadcast, web, social)
 - Partner/Governmental agencies (county, state, and federal organizations)
 - Social equity and environmental justice groups
 - Tourism Related Organizations: LA Visitors and Convention Bureau, Hollywood Chamber
 - Transit providers (municipal and local operators, regional rail, Metrolink, paratransit, DASH, and others)

Attachment G: Proposed Advisory Panels

Metro proposes to develop two advisory panels associated with the Congestion Pricing Feasibility Study (Study). These are as follows:

Panel 1: Users of the Transportation System

This panel is intended to ensure that as Metro conducts the Study, we are bringing users of the system in to learn about it and react to it regularly.

- **Types of Participants:** Comprised of local residents and users of the transportation system, including people who use transit, walk, bicycle, drive, transport goods, use other modes, with representation from across the region.
- **Roles of participants:** Provide ongoing guidance and advice to ensure that the congestion pricing program addresses the needs of the transportation users and maximizes benefits
- **Recruitment:** Established through the Congestion Pricing Feasibility Study Communications and Public Engagement Contractor (Contractor) to ensure the group is representative of the region's diverse population. The panel may consist of 20-30 representatives. Consideration will be given to age, cultural and gender identity, income, geography, and mode of transportation.
- **Level of commitment:** Participate in workshops, meetings, and in person and online engagements. Participants will be compensated through a stipend and they may choose to waive it.
- **Notes:** If necessary, refreshments, travel, translation/interpretation services, and childcare service will be provided to ensure these participants can conveniently participate in this process.

Panel 2: Stakeholders

This panel would be composed of representatives from major regional stakeholder groups representing organizations across four constituency groups. The categories include the following (numbers approximate):

- 1) **Transportation Consumers** (2 representatives) – Representatives from groups who use or would be impacted by our complex transport system and a congestion pricing program. Consumers comprise a diverse coalition representing the interests of disadvantaged communities; older adults; individuals with disabilities; students; business and small business; labor; social justice organizations; representatives in the social equity community with a focus on social justice, low-income communities and the environment. We encourage Consumer representatives to network and work collaboratively through partnerships with other like organizations in order to maximize participation and input in the process.
- 2) **Transportation Providers** (2 representatives) – Those who supply or regulate transportation infrastructure and services. Providers represent a wide range of agencies and organizations that play a pivotal role in the provision of transportation/transport and planning services. This includes representatives from municipal and local transit operators, ports, airports, private providers (e.g., ridehailing companies), Caltrans, etc. It is important that these

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representatives keep their constituencies informed and seek input from key stakeholders within their organizations and keep their counterparts informed and seek their input.

- 3) **Government** (3 representatives) – Representatives of agencies accountable to the needs of consumer and provider constituencies that directly control public right of way or work on issues that intersect with transportation and a congestion pricing program.
 - 4) **Academia/Nonprofit** (3 representatives) – Researchers and academic professionals with experience in road usage charging, mobility pricing, and specific expertise on equity.
- Roles of participants: Provide ongoing guidance and advice to ensure that the congestion pricing program addresses the needs and concerns across the region’s diverse stakeholder groups, captures the tremendous opportunities and synergies across constituencies and interests, and leverages the participant’s network of contacts to expand the reach of the study. Members do not represent their individual organization on the advisory panel, but rather the constituency related to the seat.
 - Recruitment: Identified and selected through an open application process initially. For categories that are not fully represented through the application process, Metro and its Contractor will reach out to individuals in those categories to invite participation. The panel will consist of approximately 10 representatives. Selection criteria include individuals who can best respond to the following:
 - 1) Describe how you are uniquely qualified to fulfill the responsibilities and requirements of the Advisory Council representative role.
 - 2) State the nature and breadth of the network/outreach at your disposal.
 - 3) Describe your relevant experience and knowledge of the subject matter.
 - 4) Optional: Provide personal/professional references related to your responses from #1-3 above.
 - Level of commitment: Participate in meetings and workshops during the initiation of study, major milestones, and recommendations. The Study Team will also be available to meet one-on-one with participants outside of established meetings and workshops upon request.
 - This advisory panel is convened to provide Metro with a venue to hear and learn diverse perspectives as the Study gets underway. Beyond the advisory panel, Metro anticipates that many additional stakeholder groups and individuals will be interested in participating in this process and will provide additional opportunities for those stakeholders to participate through other means and forums.

OEI Advisory Board

In addition to the panels above, the Office of Extraordinary Innovation (OEI) Advisory Board has already been established. This Board already includes some experts on congestion pricing, but OEI will add to that knowledge by bringing in a few more people from beyond California, and creating a Congestion Pricing subcommittee.

- Comprised of representatives from peer agencies and academia with experience in road usage charging and mobility pricing.

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- Roles of participants: Provide independent perspectives on the conceptual and practical aspects of proposals under consideration.
- Recruitment: Use existing OEI Advisory Board and add additional members based on Metro's network of contacts of congestion pricing researchers and peer agencies.
- Level of commitment: Participate in meetings during the initiation of study, major milestones, and recommendations.

Note: For participants traveling from out of town, a travel stipend will be provided and they may choose to waive it.

Attachment E: Project Timeline/Milestones

Procurement

May 2019: Issue Requests for Proposals for 1) Technical Services (includes Equity Analysis) and 2) Communications and Public Engagement Services

Summer 2019: Seek Board authorization to award contracts for 1) Technical Services and 2) Communications and Public Engagement Services

Pilot Development (Congestion Pricing Feasibility Study)

Duration of Study: Staff will update and engage the Board during key project milestones, which include, but are not limited to, the following:

- Advisory Panel membership selection criteria
- Summary of findings and best practices from literature review and best practices research
- Development of Equity Strategy
- Summary of stakeholder/public engagement during each round of outreach
- Summary of findings from initial screening to narrow down potential pilot locations to implement a pricing program/transit improvement package
- Summary of findings from detailed assessments of potential pilot locations
- Initial concepts for complementary multimodal mobility services and improvements that would be necessary prior to pilot pricing program implementation
- Summary of findings for legislative and institutional requirements for implementing a pricing program
- Development of Investment and Financial Plan
- Development of Implementation Plan

Pilot Implementation

The following milestones will require Board authorization to proceed:

- Go/No go decision to Implement congestion pricing pilot
- Award contract for system engineering for congestion pricing pilot
- Execute Part 2 of the Communications and Public Engagement Services contract