



# Equity Considerations for Toll Facilities



# Tolling and Pricing Defined

- Tolling has traditionally been used to fund transportation projects
- More recently it has been used to help manage demand and improve system reliability; this approach is known as “pricing”
  - Congestion pricing
  - Cordon pricing
- Caltrans is interested in using tolling as a demand management strategy and not for the purposes of revenue generation; this is also stated in CTP 2050 and CAPTI.





# Addressing Equity in Tolling

- Equity issues are often analyzed as part of pricing studies
- Various programs and strategies have been introduced in response
  - Low-income assistance programs for electronic toll collection accounts
  - Using toll revenues to fund transit improvements in the corridor
- The primary focus has been on minimizing negative and disproportionate impacts on vulnerable communities
- Some agencies are now looking at how to maximize benefits to these communities and redress historic or systemic inequities.



# Caltrans' Activities on Equity in Tolling

- Updated Managed Lanes policy
  - Requires an equity analysis
  - Tolls should not place a disproportionate burden on low-income households.
- Toll Facility Analysis Study: Usage, Benefits, and Equity
- CAPTI
  - Establishment of a Pricing Working Group
- CTP 2050 also includes several guiding principles related to pricing, a few of which focus on equity considerations



# HNTB Presentation

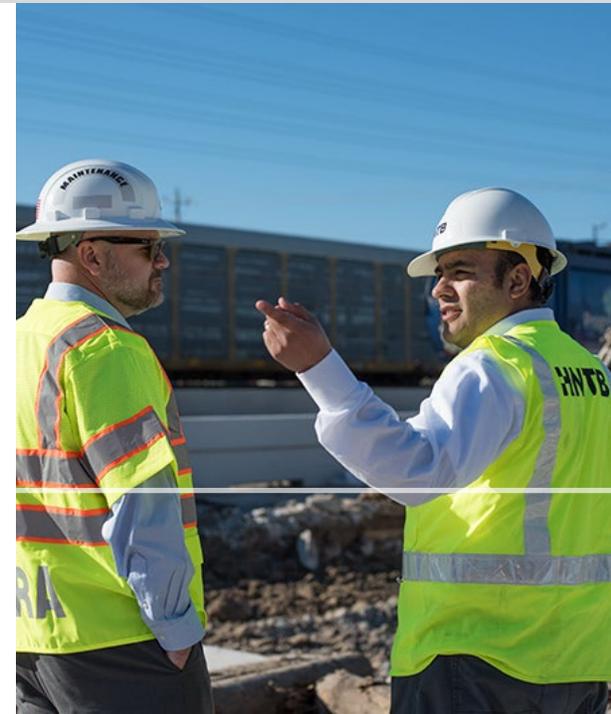
- Examples of equity programs in tolling
- Operationalizing the different types of equity
- Case Study – Route 101 HOT lanes in San Mateo County



# Equity Considerations for Toll Facilities



October 14, 2021



# OUR TEAM



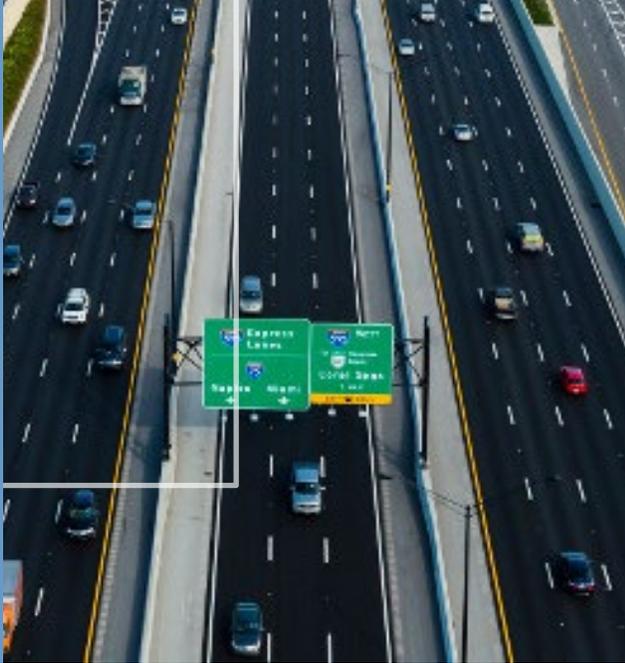
**Samantha  
Soules**



**Lacy  
Vong**



**Matthew  
Click, AICP**

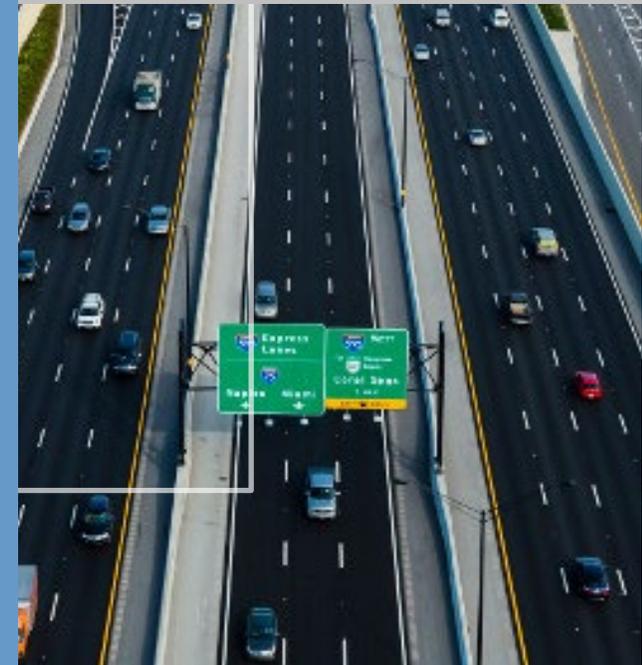


# AGENDA / DISCUSSION ITEMS

- Addressing Equity in Tolling
- Examples of Equity Programs in Tolling
- Developing an Equity Program – US 101 Express Lanes
- Operationalizing Equity in Tolling
- Discussion

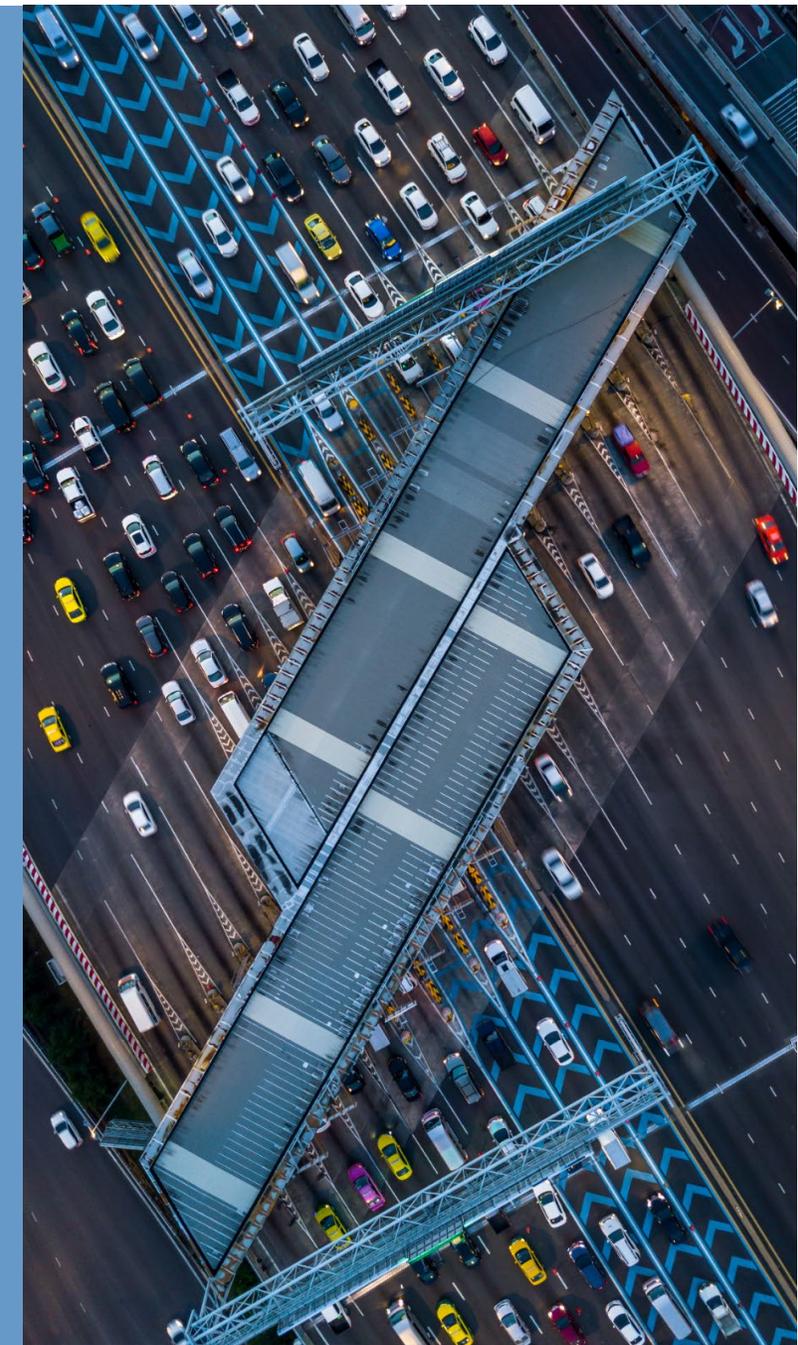


**HNTB**



# ADDRESSING EQUITY IN TOLLING

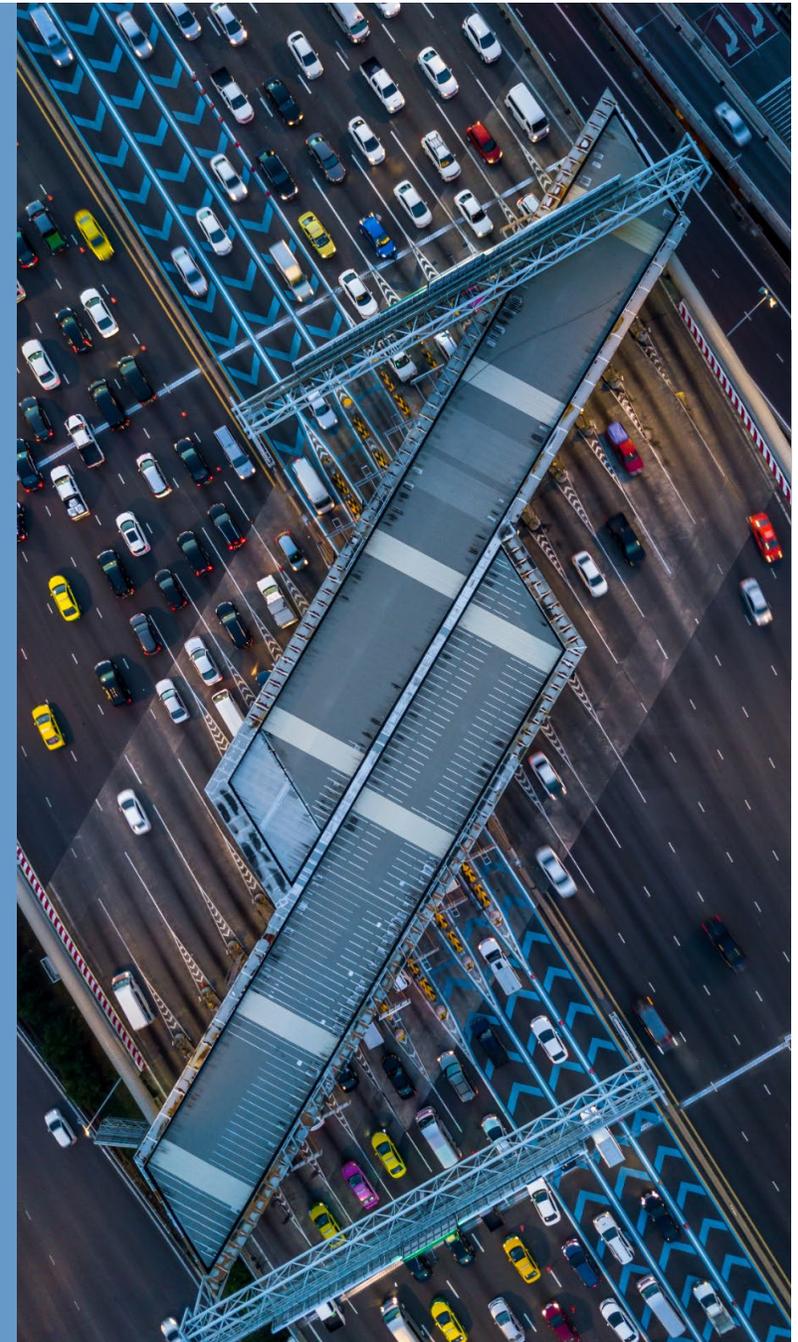
- **Who pays the toll?**
  - Single Occupant Vehicles (SOV)?
  - High Occupancy Vehicles (HOV)?
- **Who does not pay the toll or all the toll (a.k.a. Discounts)?**
  - HOV 2+ or HOV 3+?
  - Clean Air Vehicles (CAVs), Zero Emission Vehicles (ZEVs)?
- **How much of a toll do you charge?**
  - Just enough to manage the traffic operations with pricing?
  - As much as you can to maximize toll revenues?
  - Equity Program: Provide choice of subsidized toll transponders and/or direct transit subsidy to individuals\*
- **How do you charge the toll?**
  - Do you need a toll transponder? (what if I am unbanked?)
- **Where does the toll revenue go and who benefits from it?**



# EXAMPLES OF EQUITY PROGRAM TYPES

- **95 Xpress Lanes, Miami, FL – 2008**
  - Equity Program: Subsidize Express Bus Service in ELs
- **Elizabeth River Toll Tunnels, Hampton Roads, VA – 2015**
  - Equity Program: Toll Relief for Qualified Individuals
- **US 101 Express Lanes, San Mateo, CA – 2021**
  - Equity Program: Provide choice of subsidized toll transponders and/or transit subsidy to individuals\*

*\*Program is draft and still being finalized.*



# Case Study: Developing an Equity Program Across Communities

San Mateo County Express Lanes Joint Powers Authority, San Mateo, CA

## Issues or Challenges

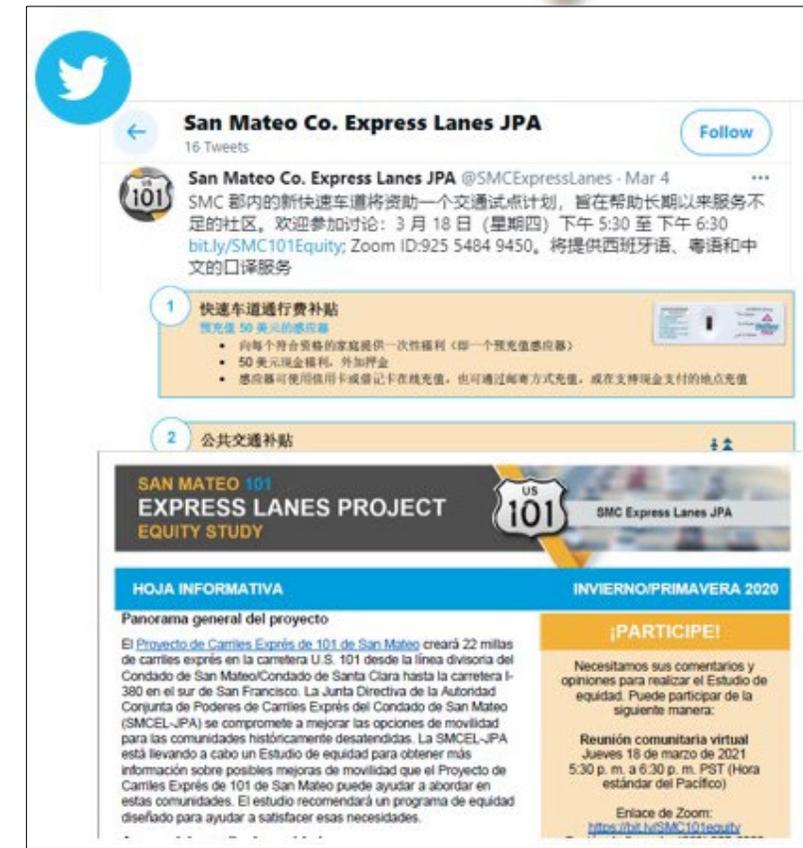
- Develop a program that addressed transportation challenges of historically underserved communities
- Providing a meaningful benefit within a budget

## High-Level Approach

- Multiple channels and phases of community engagement
- Develop options based on community input and data

## Key Takeaways and Lessons Learned

- Develop equity goals and a framework for accountability
- Meaningful engagement takes time – virtually and in-person
- Engaged leadership showed commitment for prioritizing equity
- Leverage resources through new and existing partnerships, be flexible and adaptable



# Case Study: Operationalizing Equity

MTC/Bay Area Toll Authority, San Francisco, CA

## Issues or Challenges

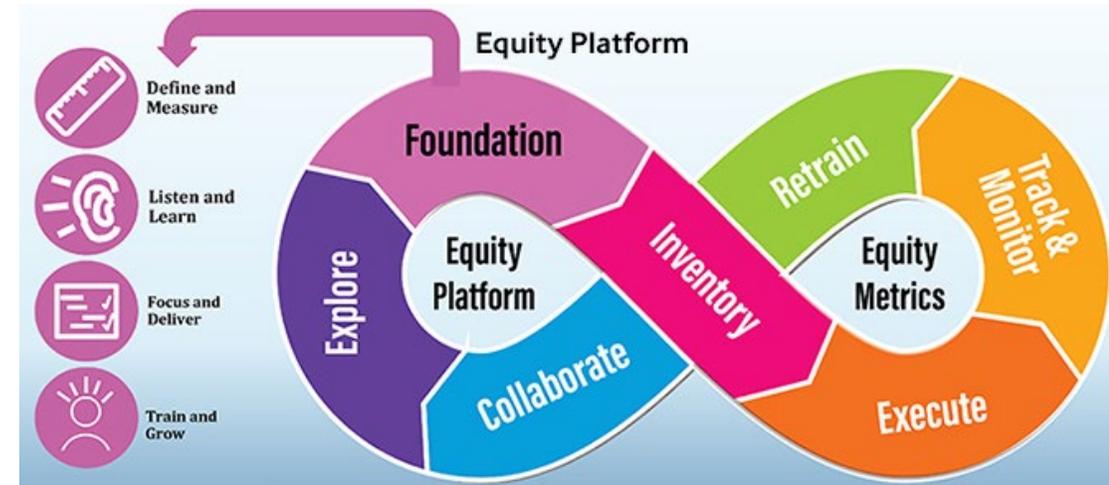
- Operationalize revised equity policies during active operations

## High-Level Approach

- Apply MTC's Equity Platform
- Review all policies that impact equity and use data to identify inequities and evaluate effectiveness

## Key Takeaways and Lessons Learned

- Customers and communities are the best compass
- Diligent planning reduces risk to operational changes
- Triage the impacts for policy changes to customers, partners and peer programs, legislation, and finances to expedite improvements



MTC Equity Platform

# COMMISSIONER Q&A

