

## CARTA REGIONAL TOLL EQUITY STUDY

### DRAFT SCOPE OF WORK

# SCOPE OF WORK

Project Information	
Grant Category	Strategic Partnerships
Grant Fiscal Year	25/26-26/27
Project Title	CARTA Regional Toll Equity Study
Organization (Legal name)	Capital Area Regional Tolling Authority (CARTA)

## Disclaimer

Agency commits to the Scope of Work below. Any changes will need to be approved by Caltrans prior to initiating any Scope of Work change or amendment.

## Introduction

Consistent with local and statewide plans, the Sacramento region is developing our first toll lanes to reduce greenhouse gas emissions, improve transit reliability, and manage freeway congestion in our growing region. To deliver an equitable toll lane system, the Sacramento region needs to evaluate the impact of toll lanes on low-income, disadvantaged, and other equity-priority communities; reduce disparities in benefits and burdens for those communities; and enhance transportation access for all users. The CARTA Regional Toll Equity Study (Study) will fill this gap by reviewing toll equity best-practices, analyzing how toll lanes will impact travel for equity-priority communities, and providing a clear and actionable roadmap for to deliver an equitable toll lane network in the Sacramento region. The Study will be led by the Capital Area Regional Tolling Authority (CARTA), a joint power authority between SACOG, Caltrans, and Yolo Transportation District (YoloTD) that is the new designated tolling authority for the Sacramento region.

## Summary of Project Tasks

### Task 01: Project Administration

CARTA will manage and administer the Study, including project-kickoff, quarterly progress reports, invoicing, and DBE reporting. CARTA will coordinate regularly with Caltrans throughout the entire Plan process including sharing deliverables; detailing issues with cost, scope, or schedule; and meeting any other requests regarding administration of this grant.

#### Task 1 Deliverables

- Agenda and notes from project kick-off meeting with Caltrans
- Quarterly invoices, progress reports, and DBE reporting

## **Task 02: Consultant Procurement**

CARTA will issue a Request for Proposals (RFP) to procure consulting services for Task 5. CARTA will lead the consulting selection process in partnership with SACOG, YoloTD, STA, PCTPA, and EDCTC. CARTA will conduct the procurement and execute a contract consistent with state and federal requirements.

### Task 2 Deliverables

- Request for Proposals
- Pre-Proposal Meeting Attendance List
- Executed contract between CARTA and the selected consultant, including consultant's scope of work, schedule, and budget

## **Task 1: Community Engagement, Partner Coordination, and Public Education**

### Public Education

Because tolling is brand new to the Sacramento region, public education is essential for communities to effectively engage with the development of the Regional Toll Equity Framework. CARTA and/or the consultants will develop digital and print materials that explain how toll lanes operate, how tolling can improve travel, and what toll lane infrastructure is planned for the Sacramento region. These materials will use clear, non-technical language to ensure the information is accessible and easy to understand for all community members. CARTA and/or the consultants will provide these public education materials in multiple languages relevant to the community—this may include Spanish, Simplified Chinese, Russian, Farsi, Dari, Arabic, Tagalog, Hmong, and others—to meet the needs of limited-English proficiency communities in the region. Public education around tolling raises the capacity of equity-priority communities and helps to level the playing field for other engagement activities, both for the Study and for toll lane projects under development in the region.

### Community Engagement

As an equity-focused plan, the Study requires regular and robust engagement, particularly with equity priority communities. Community engagement for the Study will occur in two phases. The first phase will focus on identifying mobility challenges for equity-priority communities (EPCs) (which will be defined in the study) and preferences around how toll revenue should be used to improve mobility. This engagement will occur at the same time as the technical work in Tasks 4 and 5 to directly inform the Regional Toll Equity Framework developed in Task 4.

The second phase of engagement will focus on gathering input from equity-priority communities on the action alternatives for the Regional Toll Equity Framework. This engagement will ensure that CARTA's toll equity investments directly benefit equity-priority communities. CARTA and/or the consultants will use best practices to reach equity-priority communities, including leveraging existing community events, partnering with community-based organizations, deploying both in-person and virtual activities, and repurposing engagement results from other plans and projects in the region to reduce engagement fatigue. CARTA and/or the consultants will write a Community Engagement Report that summarizes engagement activities, feedback provided, and how that feedback was incorporated in the Study.

### Partner Coordination

CARTA and/or the consultants will establish a Project Development Team (PDT) for the Study to ensure partners and stakeholders can provide input throughout the development of the project. The PDT will include traditional partners such as Caltrans District 3, SACOG, PCTPA, EDCTC, STA, YoloTD, and transit operators; technical partners who can offer guidance on exploring innovative strategies and solutions; and non-traditional partners such as non-profits, community-based organizations, and tribal governments. This inclusive approach aims to build broad support for developing a Regional Toll Equity Framework.

### Task 1 Deliverables

- Community Engagement Report
- Community engagement and public education materials, including factsheets, boards, surveys, handouts, infographics, media coverage, and website content.
- Agendas and notes from PDT meetings

### **Task 2: Precedent Review and Equity-Priority Communities Definition**

CARTA and/or the consultant will review recent and relevant toll equity studies and programs, as well as other priced transportation systems (such as parking, etc.) to establish industry standards and best practices. The precedent review will include, but is not limited to, equity focused toll programs that provide toll discount, credits, vouchers, transit passes or mobility wallets, expenditure plan investments in equity-priority communities, operations policies for unbanked toll users, and equitable enforcement methods or technology. The precedent review will focus on strategies and approaches that can be applied to the Sacramento region. CARTA and/or the consultant will develop a Precedent Review Report that summarizes how each peer program works, evaluates its effectiveness, and identifies how the program could be applicable to the Sacramento region.

CARTA and/or the consultant will analyze local, state, and federal definitions of underserved including, but not limited to low-income, environmental justice, disadvantaged communities, black indigenous and people of color (BIPOC), tribal lands, rural, older adults, individuals with disabilities, transit-dependent communities, and low educational attainment. CARTA and/or the consultant will determine, based on the unique needs of the Sacramento region and specific equity concerns of tolling, which metric or combination of metrics should determine the “equity-priority communities” CARTA will focus on in its equity program. CARTA and/or the consultant will develop an Equity-Priority Communities Report that summarizes the metrics analyzed, the metric(s) selected, and provides a map of equity-priority communities in the Sacramento region.

### Task 2 Deliverable

- Precedent Review Report
- Equity Priority Communities Report

### **Task 3: Equity Priority Traveler Analysis**

To develop a Regional Toll Equity Framework that provides meaningful benefits to equity-priority communities, CARTA needs a clear picture of how individuals from equity-priority communities travel, how that travel could be affected by toll lanes, and how benefits to those communities should be measured. CARTA and/or the consultants will leverage both quantitative and qualitative analyses to create a nuanced understanding of the needs of equity-priority travelers. CARTA and/or the consultants will write an Equity Priority Traveler Analysis Report that synthesizes the results of this analysis and identifies performance metrics to measure benefits to equity-priority communities. This analysis will serve as the foundation for the Regional Toll Equity Framework, ensuring that all strategies are grounded in evidence-based practices and aligned with the needs of low-income and disadvantaged communities. The performance metrics developed under this Task will measure CARTA's success in implementing the Framework after the Study's conclusion.

#### Geospatial Analysis and Traffic Modeling

CARTA and/or the consultants will use mapping and modeling tools to understand the socio-economic profile of travelers on all planned toll corridors across modes and how toll lanes will impact equity-priority travelers' travel times and access to jobs and other key destinations. CARTA and/or the consultants will also analyze how adjustments in toll prices and investments in parallel multimodal infrastructure could impact those travel outcomes. This analysis will be conducted for each corridor and for the combined CARTA network.

#### Focus Groups

Because Census data and traffic models don't tell the whole story, CARTA and/or the consultants will conduct a series of online focus groups with residents to collect input on toll lane policies, including equity-focused strategies. Participants will be recruited to ensure diversity and representation. The focus group meetings will include a variety of questions and exercises that establish how they travel, how they might use a toll lane, and how toll policies and equity strategies would impact their travel.

#### Task 3 Deliverable

- Equity Priority Traveler Analysis Report

### **Task 4: Regional Toll Equity Framework**

Using information gathered in previous tasks, CARTA and/or the consultants will develop a Regional Toll Equity Framework (Framework) that lays out goals, strategies, and actions to ensure the Sacramento region's toll system provides direct benefits to equity-priority communities. The Framework's actions will be specific, measurable, assigned to an agency, and prioritized for near-, mid-, or long- term implementation. These actions provide a clear summary of the next steps that CARTA and its partners will take to implement the Study. The Framework will document the rationale for each element and will emphasize integrating equity considerations at every stage, from planning to project development to toll operations. The Framework will chart a clear path for equitable tolling in the Sacramento region and guide future decision-making and progress monitoring.

#### Task 4 deliverables

- Regional Toll Equity Framework Report
- Regional Toll Equity Framework One-Page Factsheet

### **Task 5: Draft and Final Regional Toll Equity Study**

CARTA and/or the consultants will assemble the reports developed in prior Tasks, including a summary of next steps for implementation, to create an Admin Draft Study. The Admin Draft Study will be shared with the PDT for feedback. CARTA will incorporate the PDT's comments into a Public Draft Study, which will be released for public comment and presented to the CARTA Board. Following the public comment period, CARTA will incorporate any feedback and develop a Final Study, which will be returned to the CARTA Board for adoption. CARTA will submit the final Regional Toll Equity Study as an ADA accessible electronic copy, with credits to Caltrans on the cover or title page.

#### **Task 5 Deliverables**

- Admin Draft Study
- Public Draft Study
- Final Study