



Board Report

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Agenda Number: 26.

OPERATIONS, SAFETY, AND CUSTOMER EXPERIENCE COMMITTEE JANUARY 16, 2020

SUBJECT: I-10 EXPRESSLANES BUSWAY HOV5+ PILOT IMPLEMENTATION PLAN

ACTION: APPROVE RECOMMENDATIONS

RECOMMENDATION

CONSIDER:

- A. APPROVING I-10 ExpressLanes Busway HOV5+ Pilot Implementation Plan; and
- B. AUTHORIZING implementation of the I-10 ExpressLanes Busway HOV5+ Pilot.

ISSUE

In April 2018, the Metro Board of Directors adopted a motion requesting that Metro staff work with Caltrans and other stakeholders to develop a pilot program (Pilot) exclusively for the I-10 ExpressLanes increasing the required occupancy for toll free travel from HOV2/HOV3+ to buses and vanpools, as a means of preserving the ExpressLanes as a faster and more reliable travel option for ExpressLanes corridor travelers and transit users.. The stated objectives of the Pilot are to:

- Keep transit moving in the ExpressLanes.
- Move people more efficiently in the ExpressLanes.
- Reduce occupancy misrepresentation by ExpressLanes users.

In January 2019, Metro staff reported on the potential effects of the Pilot, key decision points and milestones for implementation including feedback received from corridor users on the potential impacts of the Pilot with emphasis on low-income commuters. At that time, the Metro Board of Directors authorized Metro staff to develop a more detailed implementation plan for the Pilot. This report is in response to the direction provided in January.

Staff is recommending a phased approach with Phase 1 providing free passage to transit and registered vanpools and Phase 2 adding HOV5+ vanpools to those traveling free of charge on the ExpressLanes. This approach will enable an expedited deployment of the Pilot and evaluation of two different policies which will better inform the final decision regarding the most effective policy to implement upon conclusion of the Pilot.

DISCUSSION

The I-10 ExpressLanes Busway HOV5+ Pilot Implementation Plan describes all major activities required to successfully deploy the Pilot. It has been informed by an extensive literature review of best practices, consultation with industry experts, and original research including 15 peer/partner agency interviews, 2,400 stakeholder surveys, nine focus groups, and detailed data analysis. The Implementation Plan discusses the following major activities associated with the pilot development and implementation:

- Phased Approach to Implementation
- Public education and marketing campaign efforts
- Mitigation strategies and incentives
- Roadside signage considerations
- Development of a robust solution for occupancy declaration and verification
- Before-and-after data collection and evaluation
- Concurrence from Caltrans and FHWA

The Implementation Plan concludes with a review of expected costs for implementation, a discussion of recommended deployment schedule for Phases 1 and 2, and a description of known risks and potential associated protections against them. Summaries of each category of activities in the Implementation Plan are provided in the following sections, with additional detail available in the full plan document (see Attachment A).

Public education and marketing campaign efforts

The Implementation Plan includes a multi-faceted public education and marketing plan covering all impacted audiences, with a focus on historically underserved and low-income populations. Outreach for the Pilot will begin three to six months in advance of the anticipated go-live date for each phase and will include:

- Community events and meetings with community groups and civic leaders.
- Presentations to partner agencies and key stakeholder groups.
- Targeted outreach to existing customers by e-mail and postal mail.
- Broader public outreach to corridor users and other stakeholders (e.g., vanpools, employers, commuters) using a range of media including radio, digital display boards, social media, newspapers, and Metro channels (e.g., onboard vehicle advertising, 511, Metro web site development and updating).

Mitigation Strategies and Incentives

Several complementary support strategies and programs are included in the Implementation Plan to promote a smooth and successful pilot deployment. These include mitigation strategies to address the potential impacts of the Pilot to existing HOV2-HOV4 corridor users that could lose toll-free access to the I-10 ExpressLanes, and incentive strategies to further encourage and facilitate shifts to more efficient travel modes including transit and vanpools. All strategies were selected based on a detailed screening across several metrics including alignment with Pilot objectives and goals, feasibility of deployment within the Pilot timeframe, and ability to address the specific program impacts and mode shift barriers identified by current users of the corridor through surveys and focus groups. The mitigation strategies and incentives that will be deployed on the I-10 ExpressLanes corridor as part of the Pilot are:

- Providing a two-month grace period for HOV2 and HOV3+ customers at the start of the

-
- deployment period in which they continue to receive toll-free travel.
 - Continuing existing Carpool Loyalty program for HOV2 and HOV3+ customers.
 - Continuing investment in transit services.
 - Expanding the existing Transit Rewards program to increase the frequency of rewards for transit users on the I-10 corridor.
 - Expanding the Carpool Loyalty program, as part of Phase 2, to include dedicated rewards for a new class of HOV5+ customers beyond those offered to HOV2/HOV3+ classes.
 - Promoting the existing Universal College Student Transit Pass (U-Pass) program for access to reduced transit fares for students using the corridor.

Roadside Signage Considerations

Aspects of the Pilot that affect roadside signage on I-10 include the toll-free travel for buses and registered vanpools (Phase 1) and the new definition of HOVs and the new declaration method (Phase 2). To address the new definition of HOVs, the existing signage that defines the occupancy requirements by time of day is anticipated to be replaced with new signage indicating, "Buses and registered Vanpools No Toll" (Phase 1), and "HOV5+ & registered Vanpools must register for No Toll" (Phase 2). Additionally, for Phase 2, a supplemental sign stipulating "HOV5+ is 5 or more persons per vehicle" will be placed along the corridor intermittently. To address toll-free travel during Phase 1 and Phase 2, the existing optional/discretionary signage that reminds drivers that "All HOV must have FasTrak" would be replaced with new signage reading, "Vanpools call 511 for tolling info," or "HOV 5+ call 511 for discount info" respectively. Upon calling 511, and depending on the current phase of Pilot operation, drivers would be informed about how to travel toll free on the I-10 ExpressLanes and/or about the new Pilot Mobile App and how to use it to receive toll-free trips when traveling with 5 or more occupants. The pricing signs along the corridor would also be updated to remove the line, "HOV2+ \$0 w/Flex" or "HOV3+ \$0 w/Flex." The final signs to be deployed require concurrence from Caltrans and FHWA.

Development of a Robust Solution for Occupancy Declaration and Verification

A core component of the Pilot is the development and deployment of a robust method for declaring and verifying vehicle occupancies for toll-free trips (i.e., the Pilot Mobile App). For this purpose, Metro will procure the services of a mobile app developer to provide a reliable, fast, and easy-to-use smartphone-based automated vehicle occupancy declaration and verification solution, subject to accuracy requirements. A secondary alternative mobile phone method for declaration and verification will also be available for customers that do not have smartphones or for instances where the primary system is unavailable. At no time would vehicle occupants be required to interact with the Pilot Mobile App while driving. Because of the pioneering nature of this app-based approach to vehicle occupancy verification, there is a degree of schedule uncertainty and potential liability exposure associated with this aspect of the Pilot. The contract will include provisions to protect against, but not fully eliminate, these risks.

Before-and-After Data Collection and Evaluation

The primary performance metrics used in the evaluation of the I-10 HOV5+ Pilot were selected based on their alignment with the Pilot's stated objectives from the original April 2018 Board Motion. In collaboration with FHWA, and Caltrans, the following performance criteria were selected for post-Pilot evaluation:

- Travel time and travel time reliability (ExpressLanes and general-purpose lanes)

- Maintenance of 45 mph speeds on the ExpressLanes/reduction in HOV only mode.
- Transit ridership
- Transit running time
- Person throughput (ExpressLanes and general-purpose lanes)

Concurrence from Caltrans and FHWA

Concurrence from Caltrans and FHWA is required to revise the definition of HOVs on this corridor as part of the Pilot. Caltrans District 7 formally indicated its support in a letter dated September 12, 2018. On November 8, 2018, the FHWA California Division responded with a similar letter of support. Metro staff has been coordinating with representatives from both agencies throughout the development of the Implementation Plan to ensure that it remains consistent with their expectations. Both agencies are reviewing the final draft of the Implementation Plan at this time, and their concurrence is anticipated after the final review cycle.

Cost Estimate

The cost estimate for all activities associated with performing the pilot implementation plan is \$7.7 million. The major cost components are estimated as follows:

- Public education and marketing campaign: \$1.9 million
- Mitigation strategies and incentives: \$2.5 million
- Operational Elements (i.e. design, signage, CSC/BOS, mobile app) and integration: \$2.1 million
- Before-and-after data collection and Management: \$1.2 million

Schedule

Staff recommends two phases for the I-10 Pilot, with each phase containing a 12-month full deployment period, a two-month initial grace period, and a five-month post-deployment evaluation period. Additional detail about the activities preceding, within, and following the two phases are provided in the sections below. The decision to implement Phase 2 will be dependent on the performance evaluation data from Phase 1, as well as the readiness of the declaration and verification mobile app. Any delay in availability of the mobile app will delay the start of Phase 2.

Phase 1 of the Pilot is scheduled to begin October 2020 and continue for 23 months through August 2022 and is inclusive of the following:

- Two-month “grace period” which gives commuters time to acclimate to the new occupancy requirements for toll-free travel, including formation of vanpools or switching to transit,
- Twelve months of full Pilot operations,
- Five months to evaluate Phase 1 results, which will inform the decision to move forward to Phase 2 and secure Board concurrence; and
- Four months for outreach and any other necessary preparations prior to the beginning of Phase 2 operations.

During the evaluation, Metro staff will review the effectiveness of the Pilot and, based on the before and after analysis and other criteria, make a recommendation to the Metro Board. Metro anticipates a Board decision by May 2022. The Board decision could range from rolling back to pre-Pilot

implementation operation, transitioning Phase 1 to permanent operation, transitioning Phase 1 to Phase 2 operations, or some other operating scenario. Following the Board decision, Metro staff will prepare the appropriate action plan and timetable for remaining Pilot activities.

Should the Board direct staff to move forward with Phase 2 of the Pilot, Phase 2 implementation could begin by September 1, 2022 and continue for 19 months through March 2024. As this Pilot features components that are industry innovations that have not been attempted before, there is a degree of schedule uncertainty associated with achieving each of these four stages within the estimated timeframes above. The above schedule should be considered an approximate forecast only. The 19 months include:

- Two-month “grace period” which gives commuters time to acclimate to the new occupancy requirements for toll-free travel,
- Twelve months of full Pilot operations, and
- Five months to evaluate Phase 2 and to compare the results from both phases which will culminate in a Metro Board decision regarding the status of Pilot operations moving forward.

It is anticipated that following the conclusion of Phase 2 operations (November 30, 2023), staff will review the effectiveness of the Pilot and, based on the before and after analysis and other criteria, make a recommendation to the Metro Board. Metro anticipates a Board decision by April 2024, which could range from 1) the continuance of Phase 2 operations (or some form thereof), 2) reversion back to Phase 1, or 3) roll back to pre-Pilot operations. Based on the analysis and staff recommendation, the Metro Board will decide how to move forward. If the Board decides to transition the Pilot to permanent operations, Metro staff will prepare and implement a Transition to Permanent (TPO) action plan. It is anticipated Phase 2 operations will continue during the evaluation and Metro Board decision periods.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

The FY18 I-10 ExpressLanes Pilot Program aligns with Strategic Goal 1: Provide high quality mobility options that enable people to spend less time traveling. ExpressLanes provides drivers with the option of a more reliable trip while improving the overall operational efficiency of the freeway network.

FINANCIAL IMPACT

Funds in the amount of \$1.9 million to initiate implementation of the Pilot are available in the FY20 budget in cost center 2220. Because this is a multi-year program, the cost center manager and the Executive Officer, Congestion Reduction programs, will be responsible for budgeting for future years.

Impact to Budget

The funding for this action will come from toll revenues generated from the Metro I-10 ExpressLanes operations. No other funds were considered for this activity.

ALTERNATIVES CONSIDERED

The Board may elect not to implement the Pilot. This alternative is not recommended since, based on current analysis, the Pilot can increase overall person throughput, assure travel time reliability for transit vehicles, and address current enforcement challenges related to scofflaws, revenue leakage and HOV-only restrictions.

NEXT STEPS

Upon Board approval, staff will perform all tasks and activities discussed in the Implementation in pursuit of the I-10 ExpressLanes Busway HOV5+ Pilot.

ATTACHMENTS

Attachment A: April 26, 2018 Board Motion 43

Attachment B: Draft I-10 ExpressLanes/Busway Pilot Implementation Plan - Executive Summary

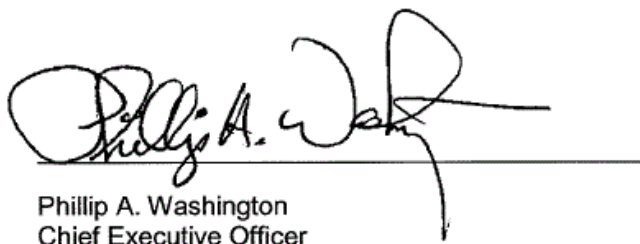
Attachment C: Draft I-10 ExpressLanes/Busway Pilot Implementation Plan

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Board Report

File #: 2018-0195, **File Type:** Motion / Motion Response

Agenda Number: 43.

**REGULAR BOARD MEETING
APRIL 26, 2018**

Motion by:

Director Fasana

as amended by Solis

I-10 ExpressLane/Busway Pilot

The I-10 El Monte Busway opened in 1973 as an exclusive busway with stations at El Monte, California State University at Los Angeles, and Los Angeles County USC Medical Center. The El Monte Bus Station, rebuilt and reopened in 2012, is the busiest bus terminal west of Chicago.

Construction of the busway resulted in substantial increases in bus service along the corridor. According to a study by FHWA conducted in 2002, "Executive Report Effects of Changing HOV Lane Occupancy Requirements: El Monte Busway Case Study", from 1973 to 1976, the number of buses using the lane in the morning peak-hour, peak-direction of travel increased from 21 to 64, with a corresponding increase in passengers from 766 to 3,044. Daily bus ridership levels increased from 1,000 to 14,500 passengers during the same period.

Three-person carpools were allowed to use the Busway for three months in 1974 during a strike by bus operators. The Busway was opened to 3+ carpools in 1976. At the time of conversion to an ExpressLane in 2013, the Busway operated at HOV 3+ during peak hours and HOV 2+ off-peak.

The I-10 Busway / HOV lane is being extended by Caltrans and Metro to the Los Angeles County Line, with an extension to Baldwin Park already open. San Bernardino County is beginning construction this year on an I-10 ExpressLane that would meet up with the Metro / Caltrans lane at the County line and extend to I-15 in 2022, and Redlands in 2026.

The Express Lane allows low occupancy vehicles to use the lanes with payment of a fee, which varies dynamically with traffic levels. To remain consistent with prior HOV 2+ and 3+ requirements, Metro developed a switchable Fastrak transponder for carpools. As ExpressLane acceptance among customers has grown, the busway has grown more congested and has degraded bus service in the corridor. As demand and price have increased, transponders are being switched to HOV 2+ or 3+ to avoid tolls.

The switchable transponder requires CHP to manually observe vehicles to determine if the number of

occupants is consistent with the setting on the transponder. Due to right of way constraints, enforcement of ExpressLane requirements is difficult on I-10, as limited room is available to pull-over and issue citations. CHP enforcement slows traffic in the ExpressLane.

Physical constraints within the right-of-way footprint also limit the ability to place thermal readers that may be able to detect vehicle occupants in the ExpressLane.

One alternative to CHP enforcement is to move to an automated approach where all cars are charged without regard to the number of occupants, through a "Pay-as-You-Use" model.

The Foothill Gold Line and Metrolink also provide east/west service through the San Gabriel Valley. The Gold Line, which will extend east to Montclair, currently is operating at capacity in some locations during peak hours according to the "Metro Rail Capacity Study" that is being presented to the System Safety, Security and Operations Committee in April 2018.

As Metro prepares to expand its ExpressLane network, piloting a new operating approach on I-10 will provide valuable insight on how best to maximize mobility on ExpressLanes.

Therefore, to keep buses moving and enable movement of more people efficiently within the I-10 ExpressLane,

SUBJECT: MOTION BY FASANA AS AMENDED BY SOLIS
I-10 EXPRESSLANE/BUSWAY PILOT

APPROVE Motion by Fasana that:

- A. Metro staff work with Caltrans and other stakeholders to develop, within existing federal and state guidelines, a pilot exclusively for the I-10 ExpressLane / Busway that would define carpools as registered vanpools with all other vehicles (other than passenger buses) subject to fees through a "Pay-as-You-Use" model. The Zero Emission Vehicles using the corridor would be eligible for discounts in effect at the time the pilot commences; and
- B. Report back to the Metro Board within 180 days on potential effects, key decision points and milestones necessary to implement this pilot including community outreach with feedback and surveys as well as service analysis on impacts and exemptions for low income commuters. The proposed pilot program to be consulted with SCAQMD in relation to Air Quality Management Plan and its impact to sticker program for Electric Vehicle.



Metro

ATTCHMENT B

I-10 ExpressLanes/Busway

PILOT IMPLEMENTATION PLAN

A DEGRADATION MITIGATION STRATEGY



December 2019

Prepared by:

HNTB

Executive Summary

Introduction

Due to factors such as increased demand, capacity constraints west of the I-710 freeway, operational challenges approaching the I-10/I-605 interchange, and occupancy misdeclaration, degradation on the I-10 ExpressLanes has been increasing. A High Occupancy Vehicle (HOV) lane or ExpressLane is considered degraded if average traffic speeds during the morning or evening weekday peak commute period fall below 45 miles per hour for more than 10 percent of the time over a consecutive 180-day period. Currently, the facility requires three or more persons for toll free travel during the AM and PM peak periods (HOV 3+) and two or more persons for toll free travel (HOV 2+) at all other times.

In response, the Los Angeles County Metropolitan Transportation Authority's (Metro) Board of Directors (Board) put forth a motion in April 2018 that proposed developing a new operating approach on I-10 by increasing the occupancy requirements in the ExpressLanes. The Board motion included the following:

- Metro staff will work with Caltrans and other stakeholders to develop, within existing federal and state guidelines, a pilot exclusively for the I-10 ExpressLanes/Busway that would define carpools as registered vanpools with all other vehicles (other than passenger buses) subject to fees through a "Pay As You Go" model. The zero emission vehicles using the corridor would be eligible for discounts in effect at the time the pilot commences; and
- Metro staff will report back to the Metro Board within 180 days on potential effects, key decision points, and milestones necessary to implement the pilot, including community outreach with feedback and surveys and service analysis on impacts and exemptions for low-income commuters.

In January 2019, the Ad Hoc Congestion, Highway, and Roads Committee issued a motion in response to the April 2018 motion referenced above. This motion requested that Metro Staff report on:

1. Potential effects of implementing the Pilot;
2. Key decision points and milestones for implementation; and
3. Solicitation of feedback and evaluation of potential impacts associated with this Pilot with a focus on low-income commuters.

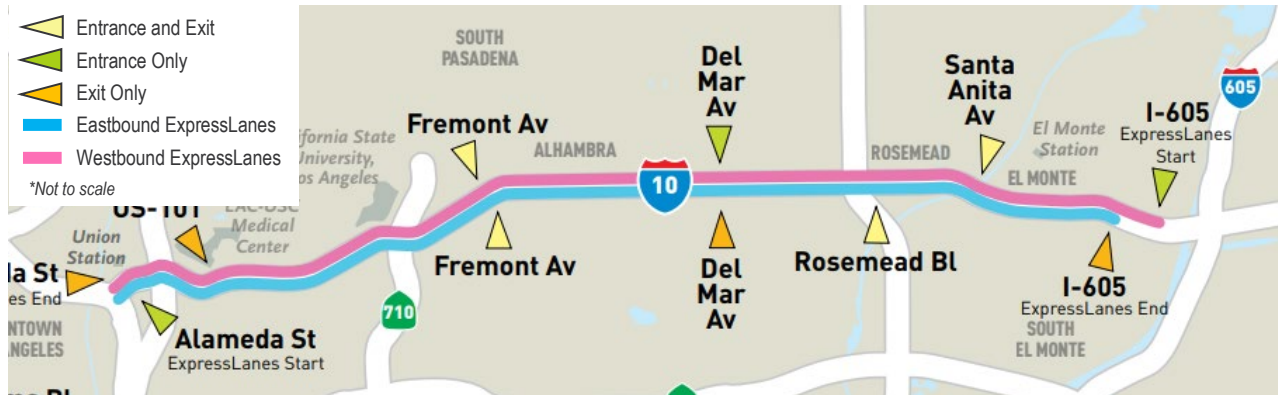
The Board adopted this motion authorizing the development of this Pilot Implementation Plan (PIP) to increase the I-10 ExpressLanes minimum occupancy requirement. Metro and Caltrans staff have also been coordinating with the Federal Highway Administration (FHWA) and FHWA has provided authorization to Caltrans and Metro to revise the definition of high-occupancy vehicles (HOV) in the I-10 ExpressLanes.

The PIP proposes a two phased approach to increasing occupancy on the I-10 – first to offer toll-free travel to transit vehicles only (defined as registered vanpools and transit) and then to vehicles with five or more occupants (HOV 5+). To accomplish this task, the PIP outlines the technical and operational requirements, communication and outreach plan, incentivization/mitigation strategies, budget, and schedule for planning and implementation.

Project Area

The project limits are identical to the existing Metro I-10 ExpressLanes between Alameda Street in the west and the I-605 freeway in the east.

I-10 ExpressLanes Project Area Map



Source: LA Metro ExpressLanes website (http://media.metro.net/projects_studies/expresslanes/images/ExpressLanes_Map_Toll_Entry.pdf)

Methodology and Findings

The PIP Development Process graphic below shows the sequence of activities that were used to develop the PIP. The activities were broken down into three phases – Research, Develop, and Implement. The Research phase focused on listening and gathering information to identify opportunities and potential concerns on the transit only and HOV5+ concepts and potential Pilot. The Develop phase includes preparation of mitigation/incentivization strategies, a comprehensive outreach/education plan, and operational considerations. The implement phase will take the plans prepared in the develop phase and put them into operation. All phases will require ongoing stakeholder collaboration/communication and program management coordination, progress reporting, and oversight. The following sections summarize the process, findings, and recommendations by phase and topic.



Research

Peer Agencies Interviews

Metro's research from speaking with peer toll agencies indicated that changing existing HOV occupancy policies is a challenging task when stricter policies are proposed. When comparing interview responses, numerous commonalities emerged as essential to a successful transition, including:

- Obtaining political support; it is key to successful implementation because elected officials and key communicators can help explain, answer questions, and communicate to the public which will help extend the reach of the outreach/marketing campaign.
- Conducting extensive public outreach; develop a robust public awareness/education campaign; and thoroughly educate the public on the new requirements prior to implementation.
- Implementing mitigation strategies to help make the transition to and implementation of new requirements as easy as possible, and offer incentives to ExpressLanes users to form vanpools/vehicle pools, increase transit usage, etc.
- Providing viable transit service options.

More from the interviews with peer agencies can be found in Section 4.

Partner Transit Agencies Interviews

Each partner transit agency interviewed brought a unique perspective regarding how the potential HOV5+ occupancy requirement may affect their service and operations. More detail on the interviews can be found in Section 5. Increasing speeds and decreasing travel times and operating costs were important benefits. However, if the HOV5+ requirement reduces congestion in the ExpressLanes, buses may travel faster than the GP lanes which may entice people to ride transit rather than drive. If the Pilot is implemented, it may have financial ramifications due to agencies needing to purchase more buses and hire additional operators and staff, if there is a significant increase in transit ridership.

Key Stakeholders Interviews

Most of the stakeholders from Caltrans and FHWA feel the ExpressLanes system is effective in reducing overall congestion and improving travel times on I-10. They acknowledged the ExpressLanes are more efficient than GP lanes, but they were concerned with the potential impacts to the GP lanes once this change in occupancy requirement goes into effect. They are concerned it will increase degradation and, in some cases, divert traffic onto local streets to avoid congestion on I-10. The ExpressLanes are susceptible to congestion due to enforcement challenges, especially during peak periods. Stakeholders suggested several potential mitigation strategies to address these concerns, which can be read in Section 5. Metro considered these suggestions and incorporated them into the PIP where feasible.

Preliminary Outreach

To inform development of the PIP and the related outreach and education plan, preliminary outreach activities, including focus groups and electronic/field surveying, were conducted. A detailed description of preliminary outreach activities and findings is included in Section 6.

Focus groups were held with voluntary community participants who commute as solo drivers, vehicle/van pools, or use transit on the I-10 corridor. In addition, Metro conducted field and electronic surveys and received approximately 2,400 survey responses. Focus group and survey findings and recommendations included:

- Existing carpoolers are more likely to seek out a 5+ vehicle pool.
- Financial incentives are the most attractive.
- Simple, straightforward, and transparent communication about the Pilot is desired.

- Communication through radio and newspaper ads, billboards, highway messaging signs, email, text, direct mail, and public outreach materials and events is preferred.
- More effective ExpressLanes enforcement is needed.

Based on these findings, a Comprehensive Outreach and Education Plan (Section 8) was developed. It includes a strategic messaging campaign to help build awareness and consensus and to consistently message the need and benefit of transit only and HOV5+ prior to implementation.

Develop

Based on what was learned in the investigation phase (RESEARCH), Metro considered several activities to include as components of the PIP during its development. These options were evaluated against the Pilot's goals and objectives while considering what would potentially be the most impactful and implemented in a short timeframe. That analysis resulted in the identification of specific activities that formed the PIP (DEVELOP). These are recommended for implementation as part of the PIP (IMPLEMENT).

Phased Approach

Increasing occupancy requirements aligns with the original intent of the El Monte Busway, and it will help mitigate degraded conditions caused by overutilization of the existing ExpressLanes, particularly where capacity is more constrained (e.g., I-10 ExpressLanes single-lane segments).

The Metro Board's April 2018 motion was to implement a Pilot that increases toll-free occupancy requirements from HOV2+/HOV3+ to transit (buses and vanpools only) to preserve the ExpressLanes as a fast, reliable travel option. After the motion was approved, Metro prepared the *I-10 ExpressLanes/Busway Preliminary Assessment* (October 2018), which provided an alternative option of allowing HOV5+ vehicles to travel toll free. As a result, the PIP proposes a two phased approach to increasing occupancy as follows:

- **Phase 1:** Transit only (buses and registered vanpools) travels toll free in the ExpressLanes; all others pay the full toll. (add how you would register a vanpool)
- **Phase 2:** Addition of HOV5+ vehicles travel toll free in the ExpressLanes; introduction of an occupancy declaration/verification mobile application (app).

Under the Pilot, Metro would revise the current definition of the HOV policy of HOV3+ (three-or-more-person vehicle pool) during peak and HOV2+ (two-person vehicle pool) during off-peak periods to transit only (buses and registered vanpools) in Phase 1 and then add HOV5+ (five-person vehicle pool) in Phase 2 for toll-free travel in the ExpressLanes.

In Phase 2, HOV5+ vehicles wishing to take advantage of toll-free travel will need a valid FasTrak® account and transponder or sticker tag on a vehicle's windshield, and they would have to declare a vehicle occupancy of at least five people using a mobile application (app).

PIP Support Strategies

The PIP also identifies potential mitigation and incentivization support strategies. Their purpose is to mitigate the Pilot's impacts on current HOV2+/3+ ExpressLanes users who will have to pay a toll under the Pilot and to encourage transit use and the formation of vanpools and 5+ vehicle pools. Certain existing Metro programs will also be featured as support strategies. The recommended mitigation and incentivization strategies are consistent with input received from focus groups and

field/online surveys conducted as part of the preliminary outreach efforts which informed development of the PIP.

Mitigation Strategies

The purpose of mitigation strategies is to offset the real or perceived impacts of changing the toll-free occupancy requirement from 2+/3+ to transit only and then HOV5+. The top mitigation strategies recommended for the Pilot include:

- Provide an introductory grace period of two months for 2+/3+ carpools (depending on peak period) where they can travel for free before the full implementation of each phase.
- Expand the existing 2+/3+ Carpool Loyalty Program.
- Expand the existing Transit Rewards Program.

Incentivization Strategies

Incentivization strategies are designed to encourage transit use and the formation and use of vanpools and 5+ vehicle pools beyond the financial incentive of toll-free travel. The top incentive strategies recommended for the Pilot are:

- Develop Vanpool and HOV5+ Vehicle Pool Loyalty Toll Credit Drawing Programs (similar to the current HOV2+/3+ program).
- Establish a Vehicle Pool Rewards program where the HOV5+ vehicle pool driver would receive a toll credit after 16 one-way trips during peak periods.

Existing and Potential Programs

The Pilot will benefit from the continuance of Metro's current Low-Income Assistance Plan and Guaranteed Ride Home Program. These programs will be continued, and ongoing outreach and education will be provided as part of the PIP. Metro will also continue current internal/external programs and relationships during the Pilot by collaborating with Metro Transit and other transit partners, 511, and third-party traffic information providers (e.g. Waze) or similar programs.

Additionally, an opportunity exists to further develop the concept of a Transit Re-Investment Program which would use excess toll revenues to enhance existing transit operations. This could encourage commuters to use transit over vehicles and increase passenger throughput, a goal of Metro's Congestion Reduction Program and this Pilot. As part of the Pilot's next steps, staff will collaborate with I-10 ExpressLanes transit operators (Metro and Foothill Transit) and continue to develop guidelines/criteria for participation in this potential program.

Disadvantaged Community and Equity Considerations

In all PIP and Pilot activities, Metro will focus on reaching and meeting the needs of disadvantaged communities and addressing equity concerns and opportunities. For the PIP, this primarily includes outreach activities and the continuance of the Low-Income Assistance Plan. Should the Pilot be successful and become permanent or extended to other Metro ExpressLanes facilities, there may be opportunities to further enhance these programs based on lessons learned during the Pilot.

Comprehensive Outreach and Education Campaign and Support Strategies Implementation

Section 8 discusses Metro's plan to implement a comprehensive public outreach/education campaign to support the Pilot. The program was developed based on input from focus groups,

surveys, stakeholders, and peer agencies and in close coordination with the Metro Marketing and Community Relations teams. The program's purpose is to 1) ensure I-10 corridor travelers are informed about the Pilot and the changes that will come with each phase; 2) mitigate impacts from the Pilot on current ExpressLanes users; and 3) encourage transit use and the formation of vanpools and HOV5+ vehicle pools as an alternative to driving alone or in smaller carpools. It will focus efforts on historically underserved and low-income populations and ensure all the appropriate audiences are reached.

Comprehensive outreach/education activities include:

- Communicating directly with Metro ExpressLanes FasTrak® customers.
- Engaging existing partnerships with key stakeholder groups within the San Gabriel Valley, sharing information with new stakeholders, and distributing collateral materials online, in-person, and by mail.
- Participating in targeted community events and meetings with community leaders in known I-10 commute sheds, with a focus on low-income and disadvantaged communities.
- Advertising on radio, digital display boards, and local newspapers, and Metro-owned media, including onboard rail/transit/bus advertising, 511, Metro and partner websites, and Metro Source articles.
- Leveraging Facebook, Instagram, and Twitter, which will act as tools to monitor and respond to public reactions to the Pilot.
- Utilizing free mediums available (social, digital, and press release [PR], editorial board, etc.) to maximize the number of impressions¹ and the budget.
- Conducting focus groups and electronic surveys to gather feedback.

Metro will also perform further education and outreach activities to support continuance of the Pilot or to revert to pre-Pilot operations depending on the Board's direction.

Operational Considerations

There are several operational considerations to be addressed for successful implementation of the Pilot. The Implementation Roadmap includes the following activities:

- Implement required signage changes to reflect the change to buses/registered vanpools only and then HOV5+ for toll-free travel in the I-10 ExpressLanes (Section 9 and Appendix A).
- Develop pre- and post-Pilot data needs and establish a baseline data and collection plan to assess impacts from each phase (Section 10).
- Procure and implement the mobile app for occupancy declaration prior to beginning Phase 2 (Section 9.4).
- Assess and implement needed modifications to BOS and customer service center (CSC) technology to support the Pilot.
- Train CHP enforcement officers, ExpressLanes customer service representatives, and other Metro staff for the Pilot.

¹ Impressions are the number of times an advertisement is viewed/heard by the public.

These activities will need to be completed before Go Live for Phases 1 and 2. Some of these activities are already underway. For example, Metro continues to meet with Caltrans and FHWA regarding signage changes and to identify data needs to evaluate the Phase 1 implementation. Also, preparations are underway for the mobile app procurement and to address potential customer service technology needs.

Implement

Program/Project Management

The PIP and the Pilot will be implemented and managed by Metro’s Congestion Reduction Department. Program/ Project Management will be ongoing throughout the develop and implement phases. Specific program management tasks will include progress reporting, defining the decision-making structure, establishing a risk register/mitigation strategy (Appendix C), budget management, regularly reviewing the schedule and identifying critical path tasks, maintaining open issues lists, and conducting regular project team meetings.

Stakeholder Collaboration

Beginning shortly after Board approval and leading up to and during the Pilot, Metro will continue ongoing stakeholder collaboration with peer transit agencies, Caltrans, FHWA, CHP, and other stakeholders that provided input for the PIP, including KPIs to measure Pilot success. Collaboration activities will include meetings with stakeholders to review the PIP, establishing regular meetings leading up to and during the Pilot to share information, evaluating how the Pilot is progressing, and making course corrections as needed. PIP and Pilot Budget

As indicated below, the budget for the Pilot is expected to be around \$7.9 million. A description of the cost estimate methodology is provided in Section 11.

TASK	COST
Outreach/Education/Marketing	\$1,895,215
Mitigations/Incentives	\$2,450,910
Operational Elements (i.e., design, signage changes, CSC/BOS, mobile app)	\$2,109,575
Before/After Data Collection and Management	\$1,244,300
TOTAL	\$7,700,000

PIP Implementation Schedule

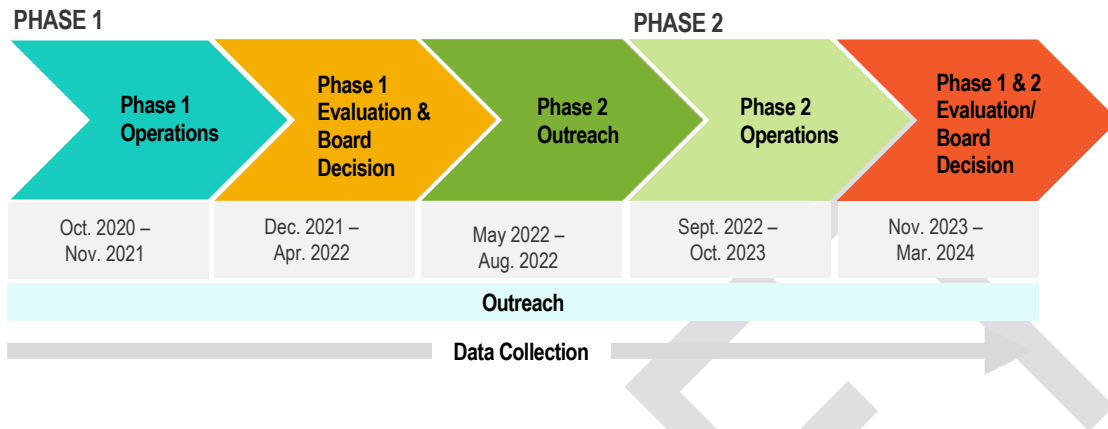
The PIP implementation schedule includes activities that need to be completed prior to Go Live, as well as activities that will be ongoing during the Pilot's phases and potentially occur post-Pilot. Metro anticipates that it will take approximately eight months to complete all the pre-Go Live activities for Phase 1. Metro anticipates a 14-month operational period for each phase that includes a two-month “grace period” to mitigate potential confusion by customers. The decision to implement Phase 2 will be dependent on the performance evaluation data from Phase 1 as well as the readiness of the mobile app. A high-level PIP implementation schedule is in Section 3 (Figure 11).

Proposed PIP activities are described in Sections 7 (Pilot Implementation Plan Support Strategies), 8 (Comprehensive Outreach and Education Plan), 9 (Operational Considerations, and 10 (Data Collection and Analysis Plan) of this document, and they are further expanded upon in the Implementation Roadmap and Master Schedule in Appendix B.

Next Steps

Metro is prepared to implement the PIP and will begin preparing for Phase 1 upon Board approval. The estimated Timeline of Pilot Implementation Activities is provided below:

Timeline of Pilot Activities





Metro

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ATTACHMENT C

I-10 ExpressLanes/Busway Pilot Implementation Plan:
A Degradation Mitigation Strategy

Document Available Online At:

[http://libraryarchives.metro.net/DB_Attachments/200109_Attachment_C_Implementation_Plan.p
df](http://libraryarchives.metro.net/DB_Attachments/200109_Attachment_C_Implementation_Plan.pdf)