

## **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](http://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

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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.

<b>Milestone</b>	<b>Anticipated Completion</b>
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

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### **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.

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### **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.



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- **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

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

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**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.

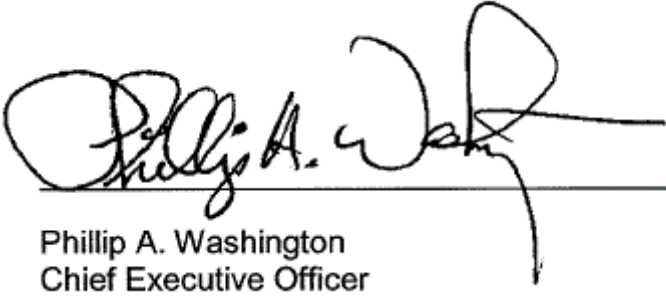
### **NEXT STEPS**

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

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

**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.

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**Attachment D: Concurrent Efforts Undertaken by Metro**

<b>Title</b>	<b>Description</b>	<b>Access Link</b>
Vision 2028 Strategic Plan	Metro’s 10-year strategic plan to improve mobility in Los Angeles County, adopted in June 2018.	<a href="https://www.metro.net/about/metro-vision-2028-plan/">https://www.metro.net/about/metro-vision-2028-plan/</a>
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.	<a href="https://boardagendas.metro.net/board-report/2017-0912/">https://boardagendas.metro.net/board-report/2017-0912/</a>
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.	<a href="https://www.metro.net/about/special-projects/public-participation-plan/">https://www.metro.net/about/special-projects/public-participation-plan/</a>
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.	<a href="https://boardagendas.metro.net/board-report/2018-0668/">https://boardagendas.metro.net/board-report/2018-0668/</a>

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

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**Attachment E: Relevant Documents and Related Efforts**

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

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

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

### 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

## **Attachment D: Statement of Work – Communications and Public Engagement – 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.