



Urban Partnership Agreement Key Elements Regarding Tolling

1. Legislative authority* to toll SR 520 must be provided in the 2009 session and in effect by July 1, 2009 to secure UPA funding. This must include:
 - Ability to do variable pricing
 - Ability to set tolls at a level to reduce congestion (implied)

NOTE: Proposed legislation should be vetted with FHWA to ensure the legislation meets its intent.
2. The terms of the UPA must be met and/or renegotiated; otherwise, funding could be in jeopardy. Significant terms include:
 - Operational by September 30, 2009*
 - Ability to set tolls to achieve free flow traffic*
 - Discounted or free access for 3+ vehicles*
 - Private buses exempt from toll if public transportation is exempt
 - Foreign governments or international organizations exempt from toll

NOTE: WSDOT and its UPA partners have already initiated conversation with FHWA re: revising the operational date, the definition of “free flow” traffic, and method of providing 3+ discounts.
3. The future HOV discount policy must be sufficiently determined at this time to provide guidance for the Customer Service Center vendor; policies at a later date which cannot be supported by the system may require a change order.
4. The goal of the UPA, from a federal perspective, is to reduce traffic congestion through variable pricing, not funding for the SR 520 rebuild. FHWA has expressed concern about the emphasis on funding over congestion reduction.
5. If King County Metro cannot secure funding for the enhanced transit operations, they will not purchase the new buses, and the overall UPA grant funding might be in jeopardy.

What is the Urban Partnership Agreement?

On August 13, 2007, USDOT entered into an Urban Partnership Agreement with its Urban Partner to provide \$154.5 million for the Urban Partner to deliver the Lake Washington Congestion Management Project (aka, the UPA project). The Urban Partner consists of:

- Washington State Department of Transportation (WSDOT)
- Puget Sound Regional Council (PSRC)
- King County, WA

On June 19, 2008, the partners amended the UPA to revise funding terms. The amended and restated UPA allowed the Urban Partner to draw down a portion (\$18.09 million) of the grant immediately:

- WSDOT – \$8.03 million for critical tolling and Active Traffic Management design activities;
- King County – \$2.16 million for the design and/or construction of the Redmond Park and Ride project;
- WSF – \$7.9 million for various ferry projects specified in the UPA.

The remaining funds (\$136.41 million) may not be drawn down until the Washington state legislature has provided the legal authority necessary to implement variable tolling on the SR 520 Bridge, which must be provided during the 2009 session and in effect not later than July 1, 2009.

What is the goal of the UPA?

The goal of the UPA is to test the ability to reduce congestion through a combination of tolling, transit, technology, and telecommuting (the “Four Ts”). The UPA project will also provide significant funding toward the SR 520 rebuild, although it should be noted that this is not a goal of FHWA.

What does the UPA involve?

The UPA consists of the following six federally funded projects:

- **Variable Pricing on SR 520.** The Urban Partner will implement variable pricing (based on the level of demand) on all through lanes of SR 520 between I-5 and I-405 and, to the extent necessary to maintain free flow traffic in the through-lanes, on all collectors and distributors for SR 520 between I-5 and I-405. The Urban Partner will provide discounted or free access for vehicles with 3+ occupants.
- **Enhanced Bus Service Along SR 520.** The Urban Partner will expand transit capacity along SR 520 by adding 90 one-way peak period trips on core and other supporting bus routes operated by King County Metro and Sound Transit.
- **New Transit Improvements Along SR 520 Corridor.** The Urban Partner will construct transit facilities to include stops/stations/terminals, expansion of existing park-n-ride lots, and the provision of real time information signs at transit stations to support the tolling of SR 520.
- **Improvements to Regional Ferry Service.** The Urban Partner will carry out a number of projects to improve regional ferry boat service, as described in applications filed for funding under FHWA's Ferry Boat Discretionary Program. See Section 1.4 for more details.
- **Real-Time Multi-Modal Traveler Information.** The Urban Partner will use intelligent transportation system (“ITS”) technology to provide real-time traveler information for SR 520 and the Lake Washington corridor. Dynamic message signage prior to traveler decision points will provide opportunities for re-routing in order to access alternate travel routes (I-90, I-405, I-5).
- **SR 520 Active Traffic Management.** The Urban Partner will implement technology to provide active traffic management of the Lake Washington Corridor (SR 520, I-90, I-5, and I-405).

The UPA also consists of the following local projects aimed at increasing the use of telecommuting, flexible scheduling, and employer-based alternative commute programs. These local projects are not federally funded but are required under the UPA Program:

- Alternative Mode Support Strategies
- Worksite Based Strategies
- Telecommunications/ Tele-Work Strategies
- Pricing (Excluding Tolling) And Incentive-Based Strategies
- Market Based Tool Development

Finally, the UPA grant also includes money for several ferry improvement projects; however, these are not directly related the congestion reduction goals of the UPA project. Originally, WSF had applied for separate grant money, unrelated to the UPA program, but upon award of the UPA and ferry grant money, FHWA decided to lump the two together under the UPA, possibly for ease of administration.

To date, \$18,093,650 has been released. Should the state legislature authorize variable tolling beginning in 2010, the remaining \$136,306,350 should be released. The pending money includes: \$78 million for Active Traffic Management (ATM) and tolling to WSDOT; \$39 million to King County for transit; and \$19.4 million for ferry programs throughout the Puget Sound.

What is the budget?

Transit (new buses and park & rides)	\$41 million
Technology (active traffic management systems)	\$23.1 million
Telecommuting (builds on existing TDM programs)	\$0
Tolling (variable tolling of existing bridge)	\$63 million
Ferry Projects (throughout the Puget Sound)	\$27.4 million
Total Funding	\$154.5 million

How is WSDOT implementing its portion of the UPA?

WSDOT will deliver its portion of the UPA through a combination of contracts and in-house development.

Activity	Delivery Method
<i>Tolling (Congestion Pricing) Projects</i>	
- SR 520 Toll System Design & Construction	RFP
- Customer Service Center (Back Office) Operations	RFP
<i>Technology (Active Traffic Management) Projects</i>	
- I-5 ATM Gantry Construction	Design-Bid-Build
- SR 520 & I-90 ATM Gantry Construction	Design-Bid-Build
- ATM Sign, ITS, & Electrical Construction (I-5, SR 520, & I-90)	Design-Build RFQ/RFP
- ATM Control Software Development	In-House - WSDOT
- Travel Time Signs	Design-Bid-Build

NOTE: In order to open tolling as early as possible, WSDOT may release one or more of the RFPs prior to tolling authority; however, WSDOT will not accept proposals until after tolling authority is provided by the legislature.

What is the schedule?

Federal Projects	Milestone
<i>Tolling (Congestion Pricing) Projects</i>	
- Variable Pricing on SR 520	4Q 2010
<i>Transit Projects</i>	
- Enhanced Bus Service Along SR 520	3Q 2010
- New Transit Improvements Along SR 520	3Q 2010
- Improvements to Regional Ferry Service	Various
<i>Technology Projects</i>	
- Real-Time Multi Modal Traveler Information	4Q 2010
- SR 520 Active Traffic Management	4Q 2010
Local Projects	Milestone
<i>Travel Demand Management (TDM) Projects</i>	
- Alternative Mode Support Strategies	Ongoing
- Worksite Based Strategies	Ongoing
- Telecommunications/Telework Strategies	Ongoing
- Pricing (Excluding Tolling) And Incentive-Based Strategies	Ongoing
- Market Based Tool Development	Ongoing

What environmental documentation is needed?

Two types of NEPA environmental clearances are required for the UPA. For the tolling component, FHWA and WSDOT issued a NEPA Environmental Assessment in April 2009. A Finding of No Significant Impact (FONSI) is expected in June. For the ATM component, a NEPA Documented Categorical Exemption (DCE) has been granted by FHWA.

What does the tolling look like?

The tolling equipment will be located at a single location in both directions on SR 520. The current proposed location for this is the high rise structure at the east end of the floating bridge. This location is preferred because it is the only identified location that will not be disturbed by construction in the corridor. Overhead and in-ground equipment will be installed to counts cars, read transponders, and capture license plate images. This information will be gathered by a roadside computer located in a cabinet nearby and eventually sent to the new CSC for processing. The new Customer Service Center will either post electronic transactions to customer accounts or mail invoices to customers without a *Good To Go!* account.

How will customers without transponders be handled?

Customers without a transponder will receive an invoice for the toll transaction. This invoice will include an administrative fee to cover the additional handling costs. If the customer does not pay, the process will escalate and additional fees will apply. The details of this process are being developed as a part of the current proposed legislation.

What will the toll rate be?

Toll rates will be variable based on time of day. These will be determined by the Transportation Commission. Dynamic pricing, as is currently done for the SR 167 HOT Lanes, will not be used on SR 520. WSDOT will be conducting a Traffic and Revenue analysis to help the Commission determine the actual rates.

Will there be discounts?

Discounts for 3+ vehicles are required under the current UPA terms. This can be achieved by either:

- Allowing drivers to self-declare their occupancy status using a special transponder
- Providing discounts to transit and vanpools only using a transponder to identify these vehicles
- Providing discounts through employer operated commute trip reduction programs (no transponder required)
- Providing a designated HOV lane or declaration area (not possible on current facility but will be possible on future facility)

The current direction is to provide the ability for discounts by offering drivers the option to purchase a special transponder which allows them to declare their occupancy to the toll system.

Enforcement of all options requires manual observation by WSP as there is currently no viable technology to verify occupancy. The actual amount of discount will be determined by the Transportation Commission.

What about the Tacoma Narrows Bridge?

The Tacoma Narrows Bridge will continue to operate as it does today with the following changes:

- All customer accounts will be migrated to the new statewide Customer Service Center (CSC).
- All account management activities (customer call, website, mailings, etc.) will be handled by the new CSC vendor.
- Photo tolling will be implemented, and invoices will be mailed by the new CSC.
- Cash lane operations will remain.

What about the SR 167 HOT Lanes?

The SR 167 HOT Lanes will continue to operate, unchanged, as they do today. Transactions from the HOT Lanes will be sent to the new Customer Service Center.

What about future toll facilities?

The new CSC will accommodate transactions and customers accounts associated with future toll facilities in the State.

How will transit be involved?

As part of the UPA grant, King County Metro received \$41 million dollars to provide enhance transit service across Lake Washington. This includes the purchase of 45 new buses, expansion of several park-n-ride lots, and up to 90 additional peak-hour transit trips across the lake. The grant, however, does not provide funding for operations at this enhanced level of service, and the current proposed legislation does not allow Metro to use toll revenue from SR 520 to fund operations.

What happens when the new bridge opens?

When traffic is routed onto the new bridge, tolling under the UPA will cease, and tolling under a new SR 520 tolling scheme will take over. This future tolling scheme has not yet been determined, but the 520 Tolling Implementation Committee evaluated a number of scenarios, including single point tolling somewhere in the vicinity of the new floating bridge and multi-point or segmental tolling at various points between I-5 and I-405. The final tolling scheme will be determined during the SR 520 corridor rebuild design effort, and toll rates for the new tolling scheme will be determined by the Transportation Commission.

The final configuration for the new facility will include an HOV lane in each direction. This will further facilitate the ability to provide discounts for ad hoc HOV 3+ because enforcement efforts can be focused on one lane. All other lanes would be subject to an electronic or photo toll and not require enforcement.