



**NORTH CAROLINA**  
Department of Transportation



**NORTH CAROLINA**  
**Turnpike Authority**

# NC Toll Policy Handbook Update

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October 24, 2025

Connecting people, products and places safely and efficiently with customer focus, accountability and environmental sensitivity to enhance the economy and vitality of North Carolina



# Agenda

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1 NC Toll Policy Background

2 Toll Policy Handbook Update

3 Scope & Coordination

4 Survey Results

5 Q&A



# NC Toll Policy Background

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# NC Toll Project Development Policy (NC Toll Policy)

In 2017, the General Assembly urged NCDOT to better define its process examining the financial feasibility using toll financing to advance the delivery of expressways or price managed lane projects.

“Establishing policies and guidelines will allow for the Department to make informed decisions when selecting projects as toll candidates and is critical to moving the state forward. Understanding which project characteristics make a project viable for tolling, managed lanes, or a (P3) agreement is necessary in gaining public trust.”

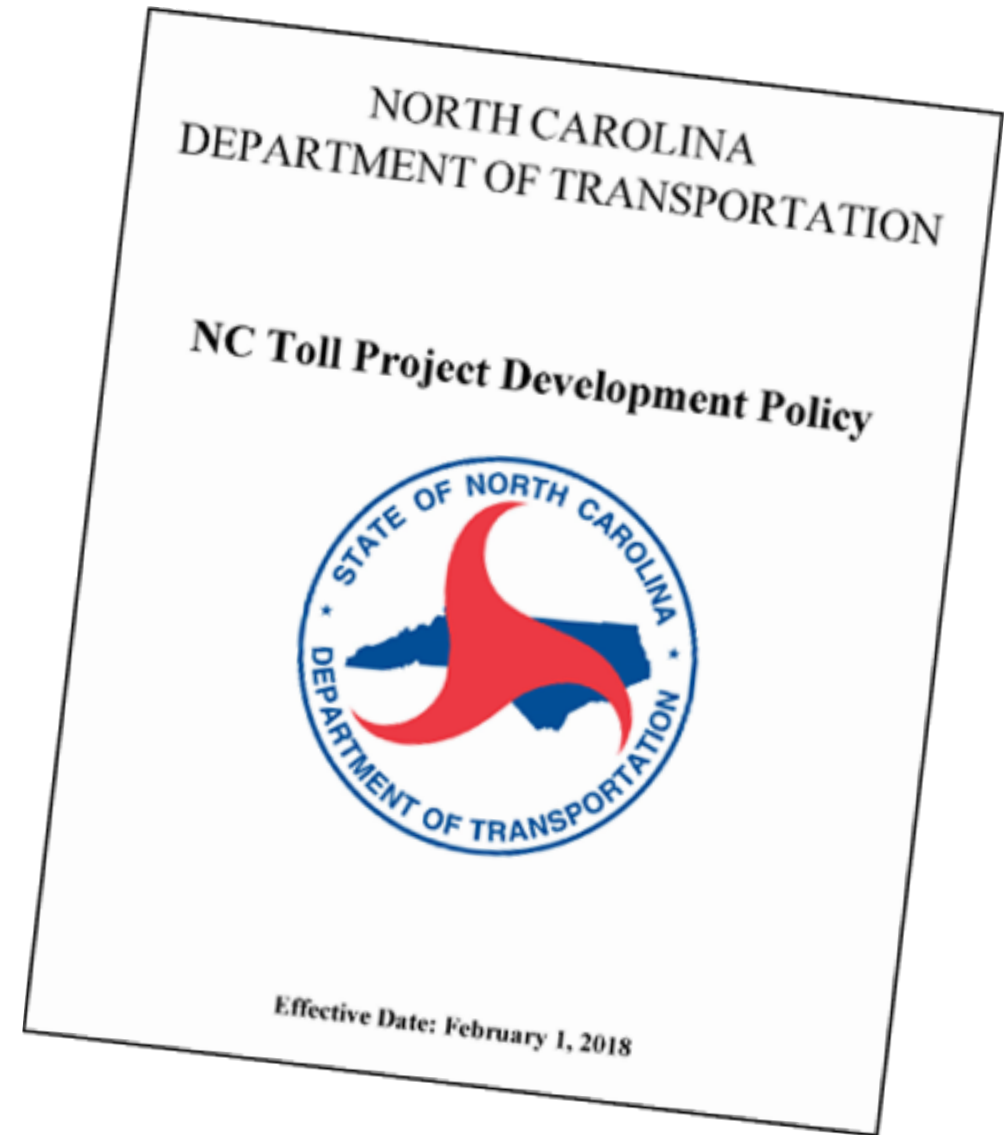
- Senators Meredith, Davis, McInnis and Rabon  
April 6, 2017



# Toll Policy Objectives

NCDOT toll policy was adopted in 2018 to

- Improve NCDOT's ability to manage a reliable transportation network, address congestion, leverage limited financial resources and provide more user choice
- Expand the Department's consideration of toll financing as an integral and important strategy to deliver critical, time sensitive transportation solutions
- Define feasibility of tolling and priced managed lanes in cooperation with MPOs/RPOs and consistent with guidelines in a Toll Policy Handbook
- Standardize state/ local practice
- Consider benchmarks, criteria, and tests to evaluate and advance tolling

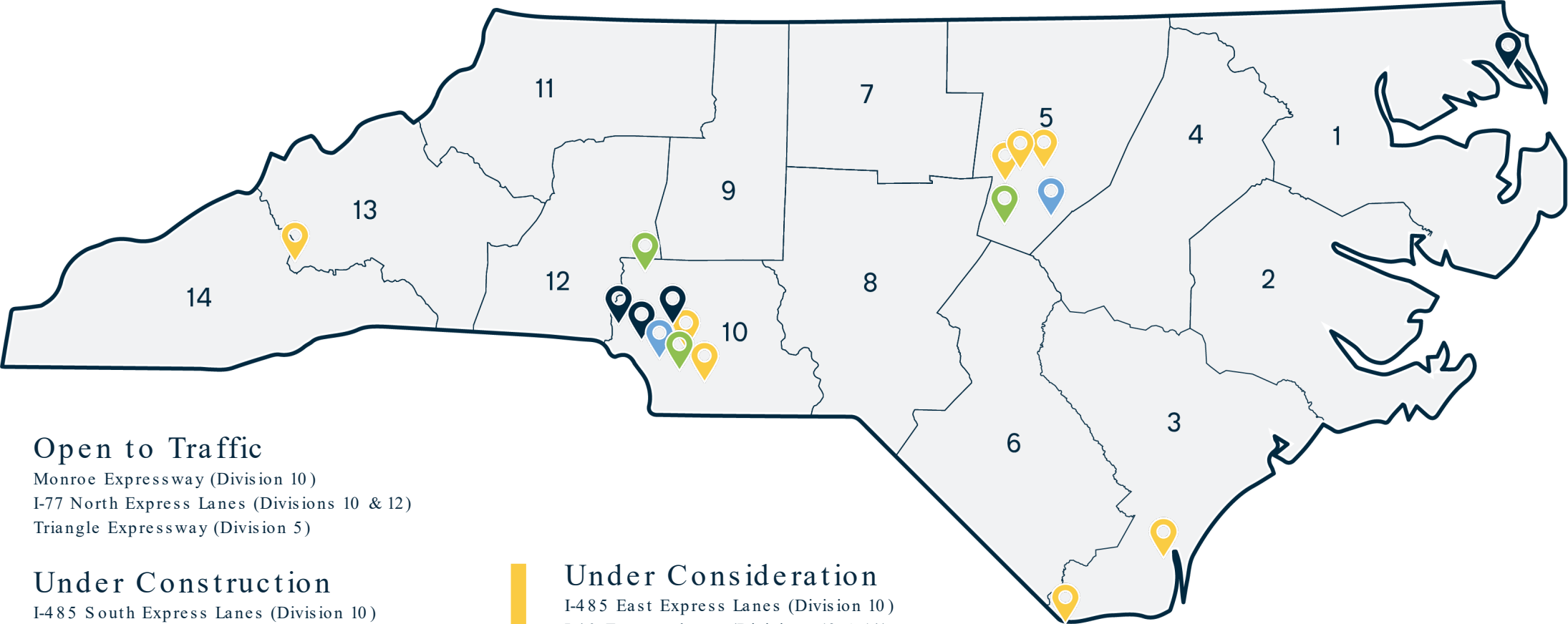


# NC Toll Project Development Policy

- The Policy:
  - Defines eligible project types
    - New Alignment Limited Access Highways with Full Access Control
    - Express Lanes
    - New Bridges or Major Bridge Replacements
    - Conversion of Other Highways to Tolled, Full Access Control
  - Directs Local initiation
  - Directs development of a defined process for evaluating toll feasibility
  - **Does not** require or mandate increased tolling
  - **Does not** allow NCDOT to identify specific projects to evaluate
  - **Does not** recommend delivery methods



# Turnpike Authority Projects



3 **Open to Traffic**  
Monroe Expressway (Division 10)  
I-77 North Express Lanes (Divisions 10 & 12)  
Triangle Expressway (Division 5)

2 **Under Construction**  
I-485 South Express Lanes (Division 10)  
Complete 540 Phase 2 (Division 5)

4 **Under Development**  
U.S. 74 Express Lanes (Division 10)  
I-77 South Express Lanes (Division 10)  
I-485 West Express Lanes (Division 10)  
Mid-Currituck Bridge (Division 1)

8

**Under Consideration**  
I-485 East Express Lanes (Division 10)  
I-40 Express lanes (Divisions 13 & 14)  
Marshville Bypass (Division 10)  
I-540 Managed Shoulder Lanes (Division 5)  
Cape Fear Memorial Bridge (Division 3)  
Capital Boulevard (Division 5)  
Triangle Expressway Phase 0 (Division 5)  
Carolina Bays Parkway (Division 3)



# Determining the Feasibility of a Potential Toll Project

1

## Initial Project Identification

Local MPO or RPO project sponsor submits projects to NCDOT to be tested for toll-financing or priced managed-lanes feasibility.

2

## Initial NCDOT Toll Feasibility Testing

Projects submitted by local MPO or RPO project sponsors are evaluated by a team using steps in the NC Toll Policy Handbook.

3

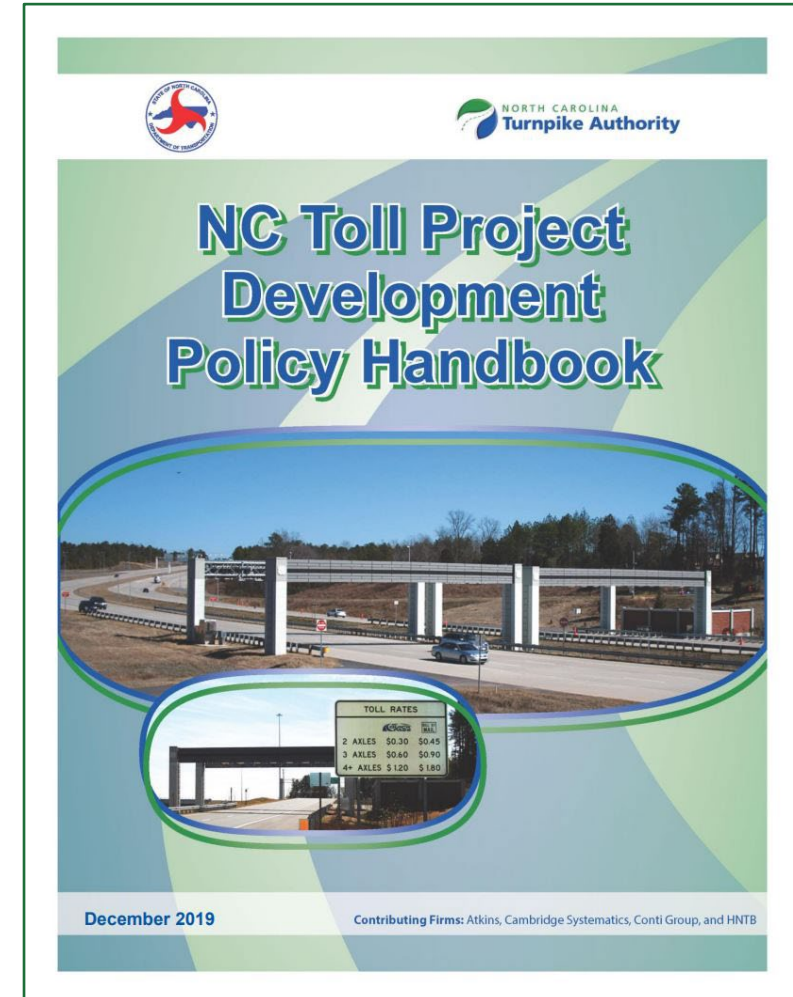
## MPO and RPO Screening

Following Financial Feasibility testing and project performance evaluation, the local MPO or RPO project sponsor conducts further screening of the tolled or express lanes projects to ensure consistency with local plans and goals and acts to consider local approval.

4

## Prioritization and Programming

Projects found to be suitable for implementation as tolled or express lanes projects, successfully screened by their MPO and RPO project sponsors for inclusion in their MTP, CTP or another adopted document, and endorsed for TIP/STIP prioritization are submitted to NCDOT through the strategic prioritization process.







# Pre-Submittal Assessment (PSA) Schedule/Steps

ROLE (lead)	STEP	STEP DETAILS	TIMELINE
<b>Project Sponsor</b> (MPO/RPO)	1	<ul style="list-style-type: none"><li>• Complete request per candidate through PSA Form</li><li>• Review inputs and resources to support assessment</li></ul>	2-3 days
<b>NCDOT IDPET / Project Sponsor</b> (TPD)	2	<ul style="list-style-type: none"><li>• ID missing data, gaps or critical information needed</li><li>• Communicate intent to evaluate toll candidate(s) with respective MPO/RPO technical/policy boards</li></ul>	2-3 days
<b>NCDOT IDPET</b> (TPD)	3	<ul style="list-style-type: none"><li>• Review schedule and discuss resource expectations</li><li>• Review all input assumptions/data to run financial feasibility analysis and/or interaction with travel demand model</li></ul>	1-2 weeks
<b>NCDOT IDPET</b> (TPD/NCTA)	4	<ul style="list-style-type: none"><li>• Conduct financial feasibility and performance testing</li><li>• Review preliminary outcomes, adjust assumptions and/or run additional iterations</li></ul>	4-6 weeks
<b>NCDOT IDPET / Project Sponsor</b> (TPD/NCTA)	5	<ul style="list-style-type: none"><li>• Review and document final technical outcomes</li></ul>	1-2 weeks
<b>Project Sponsor / NCDOT IDPET</b> (Project Sponsor)	6	<ul style="list-style-type: none"><li>• Communicate results with MPO/RPO technical/policy boards</li><li>• Review process, solicit/respond to public input</li></ul>	1-2 weeks



# 2025 Toll Policy Handbook Update

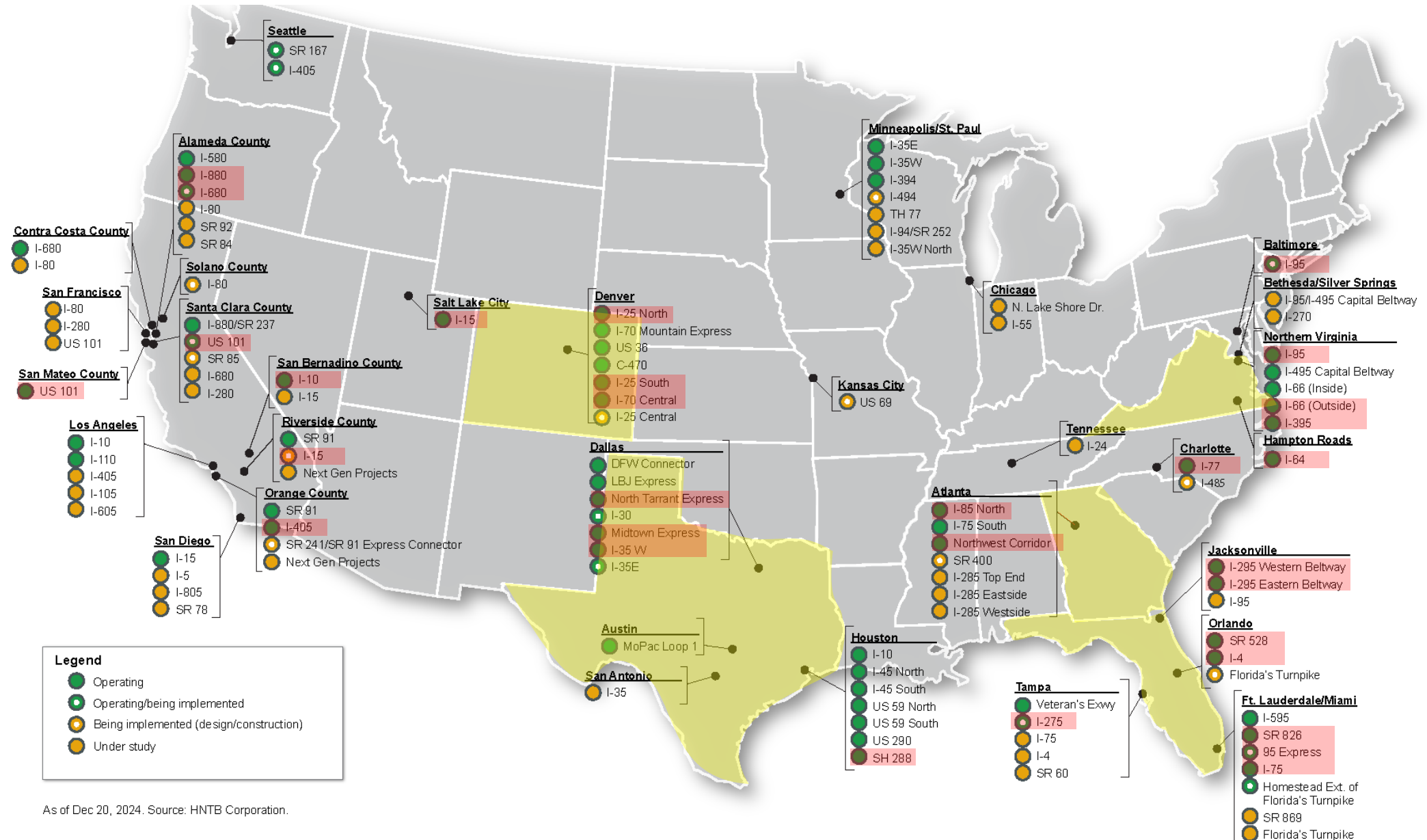
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# Why the Refresh?

- New Tolled Facilities have Opened
- New Areas Continue to Show Interest
- Changes and Trends
- Advancements in Technology



# Continued Expansion of Express Lanes Across the US



As of Dec 20, 2024. Source: HNTB Corporation.





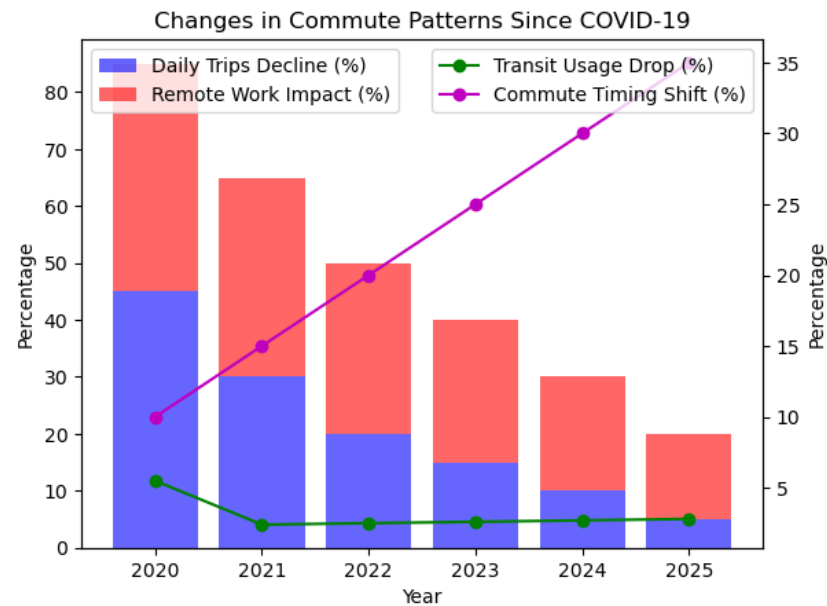
# Recent Toll Roads and Bridges

- Toll Roads
  - Houbolt Rd Ext (IL)
  - SH99 (Grand Parkway) (Houston, TX)
  - Gilcrease Expressway (OK)
- Toll Bridges
  - Belle Chase Bridge (LA) [P 3]
  - Independence Bridge (MI)
  - Liberty Bridge (MI)
  - Scudder Falls Bridge (P A)

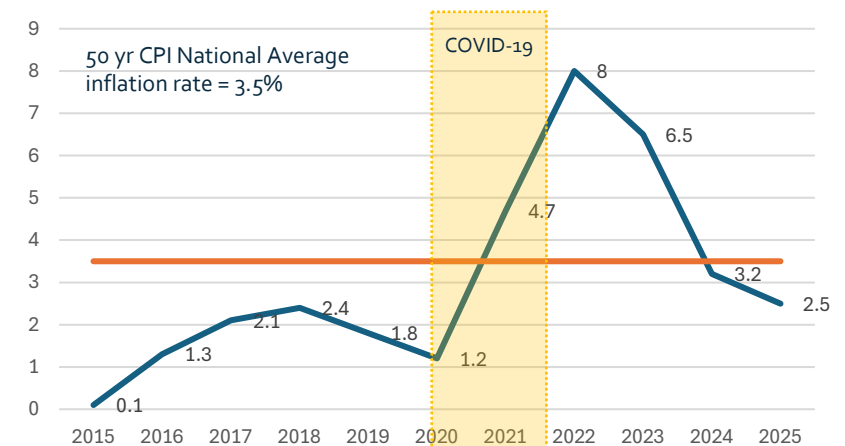
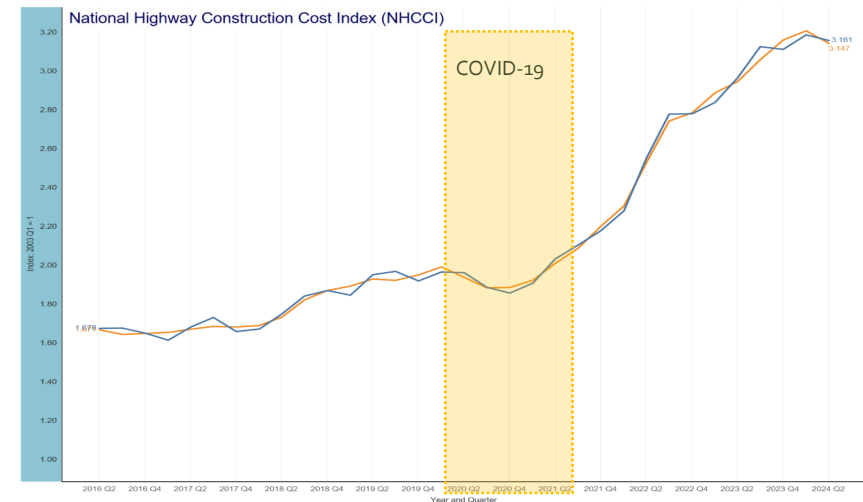


# Changes and Trends

- Changes in Commute Patterns and Behaviors
  - Peak hour/periods spread across the day
  - Changes to Transit and Rideshare Use
  - Remote Work



- Increase in Cost and Inflation







# Advancements in Technology

- Toll Systems
- Enforcement
- Cybersecurity and Fraud Protection





# Scope & Coordination

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# Toll Policy Handbook Update Scope

1. Peer Review
2. Industry Trends & Technology
3. Update Feasibility Tool
4. Update Handbook
5. Training
6. Project Management & Coordination





# Toll Policy Handbook Update Scope

## Task 1– Agency Peer Review



Agency
FDOT Central Office / Florida Turnpike Enterprise
Georgia DOT \ State Road and Tollway Authority
Virginia DOT
Texas DOT
Central Texas Regional Mobility Authority
Colorado Transportation Investment Office
North Central Texas Council of Governments
MetroPlan (Orlando)



# Toll Policy Handbook Update Scope

## Agency Peer Review Questionnaire

- When are toll projects identified?
- How do they determine toll feasibility?
- How do they prioritize toll projects?
- How and when do they engage locals?
- What trends and future technologies are you preparing for?

## Key Takeaways

- Tolling is still a viable solution
- Locals seek support from DOT/ Toll Agency for Toll Feasibility
- P3 is an option most agencies utilize





# Toll Policy Handbook Update Scope

## Task 1 - MPO Review

- Engage with MPO/RPO staff for feedback on current processes and key priorities moving forward
- MPO Questionnaire
  - Sent to all 20 MPOs
  - 15 Responded
- RPO Questionnaire
  - Sent to 17 RPOs
  - 10 Responded





# MPO Questionnaire Results

## Key Takeaways

- Need to increase awareness of the Toll Policy and its tools
- Enhance tools
  - Simplify
  - Influence greater collaboration
- Limited relevance to some areas of the state





# Toll Policy Handbook Update Scope

## Task 2 - Industry Trends & Technology

- Currently researching unit costs and pricing parameters
- Sent data request to peer agencies

## Task 3 - Update Feasibility Tool

- Online GIS Interface

## Task 4 - Update Handbook

- Solicitating feedback on user experience

## Task 5 – Training

## Task 6 - Project Management & Coordination

- NCTA Committee (Finance and/or Operations) – Nov 20, 2025
- NCDOT Board/Highway Committee – Dec 3, 2025



# Current PSA Form



## Pre-Submittal Assessment (PSA) Process Form

**Submittal Date:**  For optimal functionality, this form should be viewed with Adobe Reader.  
You can download the reader for free here: <https://get.adobe.com/reader/>

- Key Inputs
  - Roadway Attributes
  - Traffic Attributes
  - Funding Attributes
  - Tolling Attributes
- Feeds into the SPOT and CTP/MTP process

Project Information	
Project type:	Toll Road <input type="radio"/> Express Lane <input type="radio"/> Toll Bridge <input type="radio"/>
Project name:	<input type="text"/>
Project purpose and need:	<input type="text"/>
MPO/RPO submitting project:	(select) <input type="text"/>
MPO/RPO point of contact:	<input type="text"/>
Email:	<input type="text"/> Phone: <input type="text"/>
Is project part of Comprehensive Transportation Plan (CTP) or Metropolitan Transportation Plan (MTP):	(select) <input type="text"/>
If Yes, list CTP or MTP and year adopted:	<input type="text"/>
Does project have a SPOT ID or CTP/MTP ID? If so please provide:	<input type="text"/>
Route number:	<input type="text"/> Length (miles): <input type="text"/>
Termini:	from: <input type="text"/> to: <input type="text"/>
Description:	<input type="text"/>
NCDOT Division:	(select) <input type="text"/> County: (select) <input type="text"/>
Toll-related improvement type:	<input type="text"/>

Existing cross section:	(select) <input type="text"/>
Proposed cross section:	(select) <input type="text"/>

Roadway Attributes	
<i>Data for italicized fields are optional and will be completed by NCDOT if omitted.</i>	
Existing total number of general purpose lanes (both directions):	<input type="text"/>
Total number of proposed express lanes (both directions):	(select) <input type="text"/>
Intermediate access points?:	(select) <input type="text"/>
Total number of proposed general purpose lanes after project completion (both directions):	<input type="text"/>
Existing lane width:	<input type="text"/> Existing shoulder width: <input type="text"/>
Existing speed limit:	<input type="text"/> Projected speed limit: <input type="text"/>

Traffic Attributes	
<i>Data for italicized fields are optional and will be completed by NCDOT if omitted.</i>	
Current year:	<input type="text"/>
Existing average annual daily traffic (AADT):	<input type="text"/>
Opening year of project:	<input type="text"/>
Opening year AADT:	<input type="text"/>
Design year:	<input type="text"/>
Projected design year AADT:	<input type="text"/>
Existing truck percentage:	<input type="text"/>
Projected design year truck percentage:	<input type="text"/>

Funding Attributes	
<i>Data for italicized fields are optional and will be completed by NCDOT if omitted.</i>	
Funding sources:	<input type="text"/>
Other funds (if any):	<input type="text"/>
Estimated construction cost:	\$ <input type="text"/> Year of estimate: <input type="text"/>
Estimated ROW cost:	\$ <input type="text"/> Year of estimate: <input type="text"/>
Estimated utilities cost:	\$ <input type="text"/> Year of estimate: <input type="text"/>
Total estimated roadway capital cost:	\$ <input type="text"/> Year of estimate: <input type="text"/>
Expected Operations and Maintenance Cost (will be determined from financial feasibility assessment):	\$ <input type="text"/>

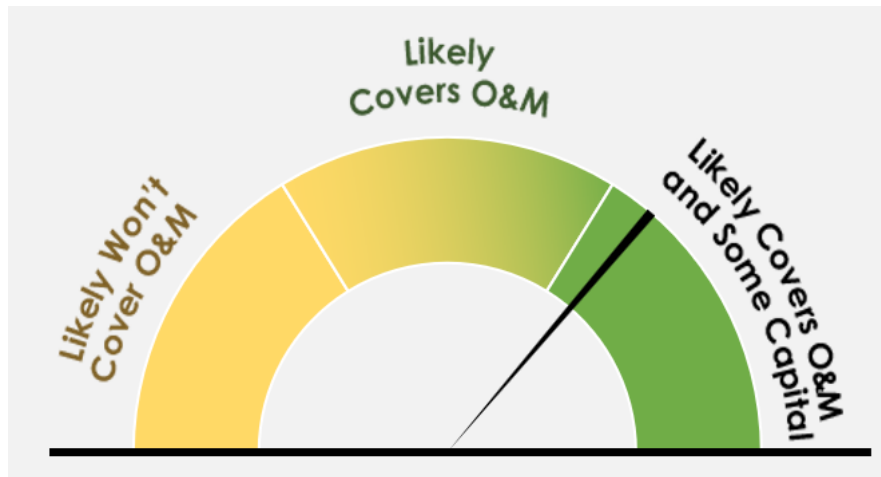
Tolling Attributes	
<i>Data for italicized fields are optional and will be completed by NCDOT if omitted.</i>	
Proposed toll rate:	\$ <input type="text"/>
Will transit vehicles be allowed to utilize the toll facility?	(select) <input type="text"/>

Additional Considerations
<i>(Please use this space to provide or clarify any additional information pertinent to your project submittal. For example a description of an improvement type not listed above, availability of additional local data to further inform project attributes, or additional purpose and need details.)</i>
<input type="text"/>

# Current Feasibility Tool

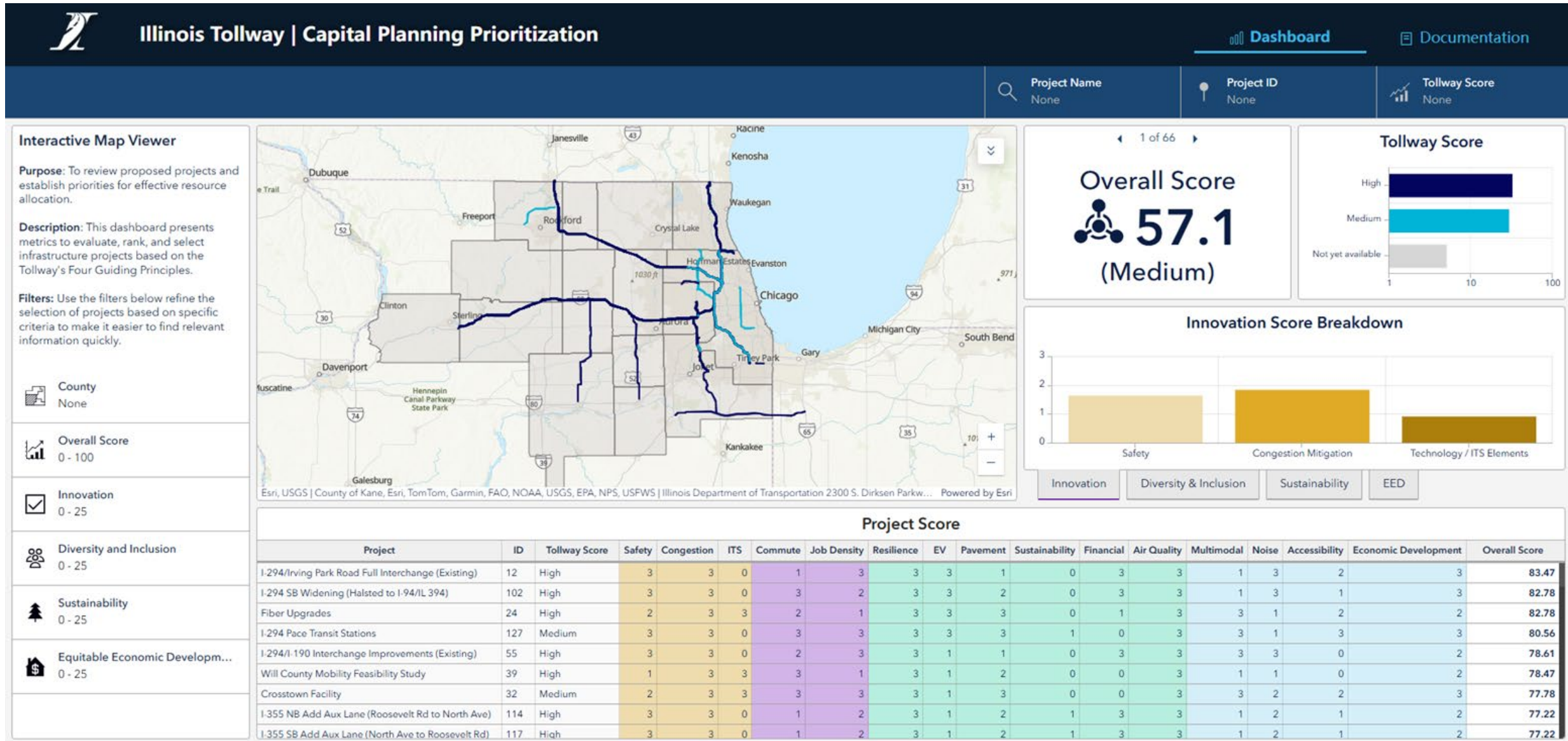
- Excel-based
- Tab for each Facility Type
  - Toll Roads
  - Toll Bridges
  - Express Lanes
- Supported by General Inputs to provide an Overall Feasibility Assessment

Express Lanes			
<b>Project Information</b>		<b>Traffic Characteristics</b>	
Project Identification Number	123	Opening Year	2030
Corridor Name	US 1	Opening Year AADT	90,000
Corridor Length (miles)	15	Design Year	2050
Total No. of proposed General Purpose (GP) lanes (both directions)	4	Design Year AADT	95,000
Total No. of proposed express lanes (both directions)	2	Average Annual Growth Rate (AADT)	0.3%
Project Location (Enter County or counties)		Truck Percentage	10%
		Share of Toll-Exempt Vehicles	0%
		Select Peak Period Characteristics	6 hrs or more (3+ hrs in both AM & PM)
		Intermediate Access Point?	Yes
		Trip Length Percent	Medium - 75%
		Value of Time (\$/hr)	\$12.50
<b>Dynamic Toll Pricing</b>		<b>Costs</b>	
Minimum Electronic Toll Collection (ETC) Rate		Capital Costs	
Minimum Toll Rate (\$/mile)	\$0.10	Construction Duration (in years)	3
		Roadway Capital Improvement Cost (\$)	\$500,000,000
		Indexation Base Year of Capital Improvement Costs	2018
Bill By Mail (BBM) Toll Rates		Toll System Implementation Cost (\$/lane-mile)	
Minimum Toll Rate (\$/mile)	\$0.15	Indexation Base Year of Toll System Capital Cost	2018
Annual Toll Rate Increase (%)	1.0%		
Indexation Base Year	2020	Operating Costs	
Toll Rate Versus Express Lane Demand		Roadway Maintenance (\$/lane-mile)	
		Indexation Base Year of Roadway Maintenance	
		2018	
		Annual Inflation Rate for Costs (%)	
		2.50%	
<b>Notes:</b>		<b>Preliminary Financial Feasibility Assessment</b>	
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			





# Feasibility Tool Update - Enhance the User Experience





## Project Schedule – Opportunities for RPO Engagement

Tasks	Task Timeframe	Engagement	Engagement Timeframe
Peer and Partner Review	Fall 2025	Peer Interviews MPO Surveys	MPO – 9/12/25 RPO – 10/24/25
Industry Trends and Technology	Fall 2025		
Update Feasibility Tool	Winter 2025 – Spring 2026	Wireframe of Tool Inputs for Tool Outputs for Tool	MPO – Dec 2025, Jan/Feb 2026 RPO – Feb 2026
Update Handbook	Spring 2026	Draft Handbook	MPO – Apr 2026
Training	Summer 2026	Attend Training	MPO – Summer 2026 MPO – Summer 2026
Final Documentation	Fall 2026	PSA, Final Handbook and Tools	MPO – Aug/Sept 2026 RPO - Aug/Sept 2026

\* Transition MPO & RPO representative into NCDOT working group (Fall / Winter 2025)



# RPO Questionnaire

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# RPO Questionnaire Results

## Key Takeaways

- Limited familiarity with the NC Toll Policy and its tools
- Greater need for education, engagement, and clarity around roles and processes
- Unsure of how tolls could be applied or evaluated
  - Several noted that tolling remains a sensitive or misunderstood topic in their regions





# RPO Questionnaire Results

## Key Challenges

- Lack of awareness and understanding of toll policy and pre-screening tools
- Minimal follow-up or communication since the initial policy rollout
- Political and public resistance, especially in rural areas
- Technological and economic barriers to toll adoption





# RPO Questionnaire Results

## Suggestions for Improvements

- Increase training and open discussion to normalize tolling as a funding option
- Clarify project screening criteria and expectations
- Share data more effectively through platforms like SharePoint, webinars, interactive maps, and outreach via RPO/MPO associations





# RPO Questionnaire Results

## Criteria for Toll Suitability

- Traffic volume (AADT), congestion, safety benefits
- Economic development potential and political feasibility
- ROI and differentiation between local vs. tourist traffic





# RPO Questionnaire Results

## Trends & Outlook

- Growing reliance on tolling due to declining gas tax revenue and funding gaps
- Increased public discourse and gradual acceptance in urban areas
- Need for better public education on transportation funding mechanisms







# Q&A

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Thank you!

# Contact Us



919-707-2713



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