



**State Transportation Advisory Committee**  
**Transportation Funding Assessment**

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Proposed TAC Study  
**Pennsylvania Transportation Funding Assessment**  
**Draft Scope of Work**  
*as of April 2, 2026*

**Background/Overview**

Safe and reliable transportation infrastructure is essential to Pennsylvania’s economy and quality of life, yet the state faces significant funding shortfalls to properly maintain and modernize its vast network. Aging infrastructure, rising costs, and a funding model significantly reliant on declining gas tax revenues have created a growing challenge for highway improvement. Similarly, public transit faces a funding crisis due to rising costs for operations and capital projects. Landmark funding acts such as Act 89 of 2013 and the federal Infrastructure Investment and Jobs Act (IIJA) of 2021 each provided critical near-term resources. Those efforts, however, did not resolve the long-term structural imbalance between transportation investment needs and available revenues. Addressing these challenges across modes is urgent to ensure safe, reliable, and efficient systems for all users.

The TAC has from time-to-time produced studies examining the importance of investing in the state’s system of nearly 122,000 linear miles of roadways, more than 25,000 state-owned bridges, and an expansive, aging portfolio of other transportation infrastructure and services. Varied regional needs across modes make the need for fundamental and lasting solutions even more pronounced. In addressing this challenge, TAC members submitted a pair of abstracts to address Pennsylvania’s transportation funding problem.<sup>1</sup> A follow-up meeting was held February 6 with members of the consulting support team and PennDOT staff to further discuss potential approaches for conducting a study.

With this proposed study, the TAC will analyze the need for investment that is sufficient to ensure the performance of the transportation system. The study will evaluate and refine key components of past efforts, identify, and analyze barriers to problem solving, and identify actionable solutions. It will also identify both the costs and benefits of scenarios (investing and not investing/status quo).

Building on existing research, this evaluation can highlight Pennsylvania’s urgent funding challenges by advancing practical, equitable strategies that consider all transportation

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<sup>1</sup> Both abstracts are attached as an appendix to this draft scope of work.



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modes. Action is essential to preserve and enhance the infrastructure that underpins the state's economy and communities. Complementary investments across modes must be a focus as a means of replacing the zero-sum/either-or perspective that has slowly increased over time. In highly urbanized areas for example, transportation system performance depends on both highways and transit – one cannot be traded off for the other. Regional variations need to be evaluated and understood without pitting urban versus rural, etc.

The study process is intended to lay out primarily the need qualitatively, describing the landscape of needs (e.g., trends, pressures, risks, impacts, etc.) more so than quantifying the funding gap and avoiding alarming and politically paralyzing bottom line funding totals that could distract from qualitative findings such as the impacts and consequences of disinvestment.

### **Study Purpose**

The purpose of this study is to establish an objective, systemwide assessment of Pennsylvania's transportation investment needs across all major modes, while providing objective context to support informed policy and investment discussions. The study will define the necessary requirements to maintain, preserve, and operate the Commonwealth's existing multimodal transportation network, including documenting the structural gap between identified needs and currently projected revenue levels. The findings are intended to serve as a foundation for policy and legislative deliberations/solutions. This will be achieved by grounding the findings in reliable data and system conditions and demonstrating the expected consequences. Specific action recommendations or conclusions about outcomes are not expected.

### **Study Objectives**

The study has several objectives, including the following:

- Define and illustrate the impacts of Pennsylvania's statewide transportation funding crisis in urban, suburban, and rural regions.
- Support the sustainability and safety of infrastructure critical to economic and social well-being.



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- Raise awareness of the costs of transportation investment (e.g., unit costs over time).<sup>2</sup>
- Identify planning objectives and performance management requirements like safety improvement, congestion reduction, asset management, and reliable system performance into investment approaches.
- Consider and build on actionable recommendations from prior studies (e.g., TFAC, TROC, partnerships) to focus on practical, implementable solutions.
- Address why earlier funding efforts have stalled, providing insights and pathways to overcome such barriers and move toward consensus around problem solving.
- Build on previous conversations with leaders from across the state at all levels of government.
- Synthesize and updates prior work, offering a fresh, cohesive analysis without duplicating previous studies.
- Leverage and synthesize existing data, findings from previous studies, and recent legislative hearing testimony to reduce redundancy.
- Consider all transportation modes, including roadways/bridges, transit, rail, aviation, water ports, and active transportation, ensuring comprehensive and system-focused recommendations.
- Engage stakeholders to build consensus and ensure the study's findings reflect diverse needs and priorities.
- Leverage robust data from TROC, regional partnerships, and key stakeholders, ensuring a well-informed and objective analysis.
- Examine targeted best practices from other states that have successfully employed other transportation funding mechanisms.<sup>3</sup>
- Have results ready to inform a new legislative session and administration term by early 2027.

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### **Scope of Work**

A 10-task scope of work has been drafted to accomplish the study objectives, as follows.

#### **Task 1 – Project Management (April 2026 – June 2027)**

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<sup>2</sup> District 9-0's September 2025 presentation to the STC could be used as a model or building block for a more expansive presentation on a statewide scale.

<sup>3</sup> The project team will examine relevant content from AASHTO, TROC, Pathways, and TETC.



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A task force will be assembled and co-chaired by TAC Chair Jody Holton and TAC Member David Heath. Members will also include representatives from modes of transportation from the General Assembly and staff members from each caucus transportation committee. Regular contact/updates will occur with Executive staff and PennDOT subject matter experts from members from the Planning, Administration, Highway Administration and Multimodal Deputates throughout the duration of the study process.

### **Task 2 – Task Force Workshop**

This will be an extended hybrid meeting to address key facets of the study, including but not limited to:

- Task force organization (e.g., possible subgroups)
- Roles and responsibilities
- Initial problem definition and root cause analysis
- Identification of key principles to guide the work of the task force and the study
- Study success factors assessment.
- Review of major milestones
- Communication approach throughout the study
- Early consideration of the elements comprising the final product—this will be outlined and refined and expanded over the course of the study.

A workshop summary will be prepared and distributed within one week of the workshop addressing key results. This summary document will be an important compass and task force pact throughout the study process.

### **Task 3 - Review of Literature (April- May 2026)**

The study team will review existing literature related to the topic, from sources as varied as legislator listening sessions, Legislative Budget & Finance Committee (LB&FC), MPO studies, TRB studies, and previous marquis funding studies such as TFAC (August 2011), and TROC (2021). A synthesis of this review will provide a useful reference for all ensuing tasks.

Other study reports that will be consulted include the Southeast (PA) and Southwest (PA) Partnerships for Mobility, which described regional needs and strategies to replace toll funding for transit capital projects and raise local matching funds for improvements.

Finally, the TAC's previous effort on transportation funding will be reexamined (as well as the disposition of this work). The report which was released in May 2010 established a

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foundational understanding of the Commonwealth's transportation needs and informed subsequent legislative and policy deliberations during a period of significant change.

### **Task 4 – Data Analysis: Characterization of System Condition and Funding/Financing Approaches (April – June 2026)**

This task will entail the development of a profile summarizing the state's multimodal transportation system, including roadways and bridges, public transit, rail and freight infrastructure, and aviation and ports.

The team will avail itself to PennDOT datasets such as the Highway Performance Monitoring System (HPMS), Bridge Inspection reports (NBI, or National Bridge Inventory), and data from the Multimodal Deputate. Census data will also be reviewed for information on changes in population (size and composition), statistics on journey to work, and household access to a vehicle.

Elements of the summary will include information on the extent, condition, and performance of the state's transportation assets. Trends in safety will also be documented, using the PennDOT Crash Information Tool (PCIT). Other data analyses will include:

- Asset Management model runs with PennDOT staff.
- Output from a current PennDOT survey on driver behavior (that closed February 28).
- Coordination with PennDOT staff as they work to update the Strategic Highway Safety Plan (SHSP).
- Review of national assessments for context such as the ASCE Infrastructure Report Card <https://infrastructurereportcard.org>.

For each mode, the study will evaluate baseline system conditions, lifecycle preservation and operating requirements, future cost trajectories, and emerging demand pressures. The analysis will focus on sustaining system functionality, safety, reliability, and economic contribution, while also examining emerging mobility challenges such as roadway congestion, transit service adequacy, demographic shifts, and changing freight and passenger demands. Key intermodal and multimodal dimensions of the problem will also be considered such as the mutual reliance of highways and transit for ensuring overall system performance in highly urbanized areas. This is important to prevent a siloed approach to the analysis.

In addition to quantifying system conditions, existing funding, and financing mechanisms available for transportation investment in Pennsylvania, will also be reviewed, such as the

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gas tax, diesel tax, vehicle registration fees, bonding, and other debt instruments. Alternative financing tools such as PennDOT's work on Public-Private Partnerships (P3) and innovative approaches such as the Rapid Bridge Replacement (RBR) program of 2013, Design-Bid-Build, and Accelerated Bridge Construction (ABC) will also be documented and assessed, as well as PennDOT's experience in applying for and securing grant funding through the federal Infrastructure Investment and Jobs Act (IIJA).<sup>4</sup> Relevant structural funding problems (including restrictions within federal funding programs themselves) will be clearly documented in terms of their cause and effects.

The analysis will also document historically what Pennsylvania's share of federal funding has been and how that has been trending. Federal funding trends over time will be documented as relevant context.

Work on this study will be performed concurrently with the development of TAC's 2027 Transportation Performance Report (TPR). The team will draw from resources uncovered as part of that parallel effort. Performance and funding are interrelated so this coordination this cycle is particularly important and opportune.

Finally, PennDOT recognizes ongoing public and stakeholder concerns regarding the efficiency of transportation project delivery and the prioritization of capital investments. Continuous improvement in procurement, project scoping, contract management, and administrative overhead remain a critical objective of the Department. The study process will acknowledge prior study efforts (such as TFAC and TROC) that have documented that even substantial efficiency gains would not eliminate the structural gap between needs and revenues.

### **Task 5 – Other States' Research Targeted/Focused<sup>5</sup> (May – July 2026)**

Targeted benchmarking of other states will add credibility, context, and practical insights to this funding assessment. Targeting means that the research will not be open ended but instead address a series of specific challenges and problems that the TAC task force and the Department first endorse for directing this research and ensuring that it has value for the overall assessment. Other states similar to Pennsylvania will be benchmarked using the following parameters:

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<sup>4</sup> Through its pursuit of grants, PennDOT has become highly acquainted with benefit cost analysis for projects. The TAC study will conduct a high-level benefit cost analysis more at a policy level so that the benefits of investment are compared to the investment costs. This will include two or more scenarios in order to illustrate the cost of a do-nothing scenario and conversely the benefits of investment.

<sup>5</sup> David Heath's abstract declared that "the study will not benchmark Pennsylvania against other states."



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**Economy:** states that feature an economy similar to Pennsylvania's, with significant employment in manufacturing and service sectors

**Geography:** much of Pennsylvania lies within the federally designated Appalachian region, with a mix of urban and rural areas and river systems. It also features a deep-water port, inland water freight routes with aging locks and dams, and a port on the Great Lakes. PA's major urbanized areas have vast transportation challenges that require some specific focus for the analysis.

**Climate:** a major factor affecting transportation and funding includes that of climate. We will compare Pennsylvania to states that have a four-season climate, with freeze-thaw cycles affecting pavements and bridges.

**Transportation Network:** states that have a mature network, with extensive infrastructure across highway, bridge, and aging public transit systems will be part of the benchmarking.

Given the preceding factors, the following states are proposed for benchmarking:

**Illinois:** good urban-rural mix, cold winters with large transit systems and an extensive roadway network. The state uses diverse revenue streams such as tolls, bonding, and gas taxes.

**Michigan:** manufacturing-heavy economy with rivers and severe winters and snow, and high roadway and bridge maintenance needs. The state has experimented with transportation-specific revenue streams, including gas taxes and mileage-based user fees.

**New York:** diverse economy, Appalachian terrain, cold winters with freeze-thaw cycles with dedicated infrastructure funds.

**Florida:** a similar in size multimodal network, that balance heavy tourism demands and freight logistics, the program is of similar size as well, but geographically is different.

**Virginia:** similar role as Pennsylvania as an East Coast, mid-Atlantic logistics hub with aging infrastructure but with more diversified revenue instruments for funding transportation.



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North Carolina: Second largest state-maintained highway system in the U.S. with a rapid growing aviation sector, provides an example of tying investment to outcomes through a data-driven prioritization process.

The purpose of this task will be to engage counterparts in other states with similar transportation systems and funding challenges and gather insights on what has worked, what has not, and key lessons learned. Another line of inquiry will be how these states analyzed the impacts of investment and under investment.

### Task 6 - Stakeholder Engagement (August – October 2026)

In addition to regular working meetings with the study Task Force, the team will engage a mix of stakeholders to obtain perspectives on transportation investment. The preliminary findings from Task 4 and Task 5 will be used as a focal point for this engagement. For each of the stakeholder engagement there will be an approach incorporated to obtain a public sounding either directly or indirectly on transportation funding matters.

Structured Interviews/Focus Groups: to include virtual and in-person meetings, to include key decision-makers, agency leaders, transit operators, and legislators. Meetings will be semi-structured to allow flexibility in exploring unexpected insights. Candidates would be finalized with PennDOT and the Task Force, but could include representatives from: APC, ACEC, CCAP, Center for Rural PA, PhilaPort, Port of Pittsburgh, PPTA, PRT, PSAB, PSATS, and SEPTA, among others.

Planning Partner Engagement: A separate effort will be conducted to engage the Planning Partners regarding types of transportation infrastructure most in need of attention; operational challenges affecting safety or mobility; and top priority needs within their respective regions. This is expected to precede the structured interviews and focus groups to establish baseline information to build upon.

### Task 7 – Qualification of Needs (November 2026 – February 2027)

As part of this task, the study process will describe the scale, types, and relative priority of transportation needs without it being a detailed cost exercise. This will assume the following approach, documenting things such as:

- Safety risks associated with aging and substandard infrastructure.
- Capacity constraints in freight corridors
- The impacts and consequences of congestion and delay



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- Future pressures from population growth or changes in climate
- Economic impacts (present and future costs and benefits)
- Public impacts spanning healthcare, employment, education, social connection, emergency response, affordability, etc.

As a qualitative assessment, the purpose of this task will be to understand what the state's needs are, not to quantify or to fund them. It will focus on trends, pressures, and risks of funding levels related to transportation, as well as assessing the impact and potential consequences of inaction.

### Task 8 - Summary of Findings (March 2027 – May 2027)

At the conclusion of data collection and stakeholder engagement tasks, the results of all of the preceding work will be synthesized into a concise, integrated summary of key findings from the study process. The summary will draw together insights from the assessment of transportation conditions, qualitative identification of needs, a review of existing funding and financing mechanisms, stakeholder engagement, and benchmarking of peer states.

This task will distill major themes, trends, and observations that emerged from this study and their implications, highlighting areas of consensus, recurring challenges, and notable distinctions between Pennsylvania and comparable states.

The summary will emphasize qualitative conclusions related to the overall adequacy and sustainability of the state's current transportation funding framework, as well as the types of pressures the system will be facing over the near and long term. Study findings are intended to complement, and not delay, replace, or constrain transportation initiatives, programs, or legislative actions already underway. Ongoing efforts to advance transportation funding, modernization, and reform should continue independently and in parallel, with this study serving to enhance clarity and support future phases of decision-making.

The findings will serve as a clear and accessible reference for decision-makers, providing a narrative that links the study's analytical components and establishes a foundation for subsequent consideration of policy options.

### Task 9 – Presentation to TAC and STC (June 2027)<sup>6</sup>

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<sup>6</sup> David Heath proposed three phases:



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Upon a final recommendation from the Task Force, we will present a final study report to the TAC at one of its regularly scheduled meetings. A follow-up presentation will be provided to the State Transportation Commission for report acceptance.

### **Task 10 – Project Close-out (post-June 2027)**

This task will include several steps, including:

- A facilitated closeout meeting with the Task Force and the Department
- Preparation of communication materials for broader dissemination such as a study FAQ, fact sheets, and speaker bureau type kit so that the results of the work can be broadly shared and presented by non-TAC members or Department staff.
- Support for the Department’s web site posting and awareness raising of the study results.
- Up to five presentations as determined by the TAC and the Department in the first 2-3 months after STC adoption.

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Phase 1 – review of prior studies, data consolidation, and baseline condition assessment  
Phase 2 – Sector-level needs analysis, revenue context, and cost trajectory development  
Phase 3 – Synthesis, funding gap assessment, and policy-relevant contextual analysis

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# **State Transportation Advisory Committee**

## **Zipper Merge in Work Zones**

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### Proposed TAC Study

## **Use of Zipper Merge in Work Zones**

# **First Draft Scope of Work**

*as of February 16, 2026*

### **Background/Overview**

Work zone safety and mobility remain persistent challenges for state transportation agencies. In 2024 there were 1,250 work zone crashes statewide that resulted in 22 fatalities. Similar crash levels have occurred in recent years, with annual totals ranging from 1,216 to 1,649 crashes and 14 to 22 fatalities between 2020 and 2024. Most work zone crashes continue to occur on state highways, including both interstates and non-interstate routes, which collectively account for more than 75 percent of all work zone crashes and fatalities each year.

Merging behavior at lane closures is a significant contributing factor to congestion, queue spillback, driver frustration, and secondary crashes. Traditional merging behavior, where drivers move out of a closing lane far upstream, often lead to long queues, speed differentials between lanes, and increased likelihood of rear-end or sideswipe crashes. The “zipper merge” encourages drivers to use both lanes fully and merge at the point of closure in an alternating pattern. Several states have documented benefits including shorter queue lengths, improved traffic flow, reduced speed variance, and lower crash rates. Minnesota DOT and other agencies have successfully deployed zipper merge strategies, demonstrating their potential when supported by consistent signing, clear communication, and public understanding.

Despite these advantages, the effectiveness of zipper merging depends heavily on driver behavior and expectations. Public understanding, willingness to follow late-merge guidance, and regional variations in traffic culture can all influence whether the strategy performs as intended. A targeted study is needed to determine how zipper merge strategies would perform under the state’s unique traffic patterns, work zone configurations, driver culture, and enforcement environment.

To explore this issue further, TAC members submitted an abstract proposing a study of zipper merge behavior in work zones.<sup>1</sup> A follow-up meeting was held February 6 with

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<sup>1</sup> The abstract is attached as an appendix to this draft scope of work.



## **State Transportation Advisory Committee** **Zipper Merge in Work Zones**

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members of the consulting support team and PennDOT staff to discuss potential approaches for conducting the study.

Work zones affect more than just motor vehicles. The study must consider:

- Commercial vehicles, which have a significant impact on merge dynamics due to vehicle size, stopping distance, and lane discipline.
- Transit buses, whose delays can cascade into schedule reliability and passenger experience.
- Pedestrians and bicyclists, particularly in urban or constrained work zones where merge patterns shift traffic laterally.
- Emergency response vehicles, which rely on predictable merging behavior to maintain response times.

A multimodal assessment ensures that zipper merge recommendations are safe and practical across all modes navigating or adjacent to work zones.

Work zone safety is also a priority area in PennDOT's 2022 Strategic Highway Safety Plan, which calls for improved work zone design, expanded public education, stronger performance management, targeted commercial vehicle safety measures, and enhanced enforcement coordination. A structured zipper merge study aligns directly with these strategies by helping the Department better understand driver behavior, evaluate operational performance, assess public acceptance, and determine the feasibility of statewide or corridor-specific implementation.

By combining statewide crash trends, PennDOT's SHSP priorities, insights from national research, and lessons learned from peer agencies, this TAC study will help determine whether zipper merge strategies can meaningfully improve work zone safety, traffic operations, and driver experience under Pennsylvania's unique operating conditions. The resulting findings will provide a clear, evidence-based framework to guide future policy decisions and implementation pathways.

### **Study Purpose**

The purpose of this study is to evaluate the effectiveness and applicability of zipper merge strategies for work zones in Pennsylvania. The study will assess how zipper merging influences safety, traffic flow, driver behavior, and multimodal operations under the Commonwealth's unique roadway, cultural, and enforcement conditions. It will also identify the work zone contexts where zipper merging is most beneficial and the



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communication, signing, and enforcement approaches needed to support successful implementation. The findings will provide an objective foundation for policy and operational discussions without recommending specific actions or outcomes.

### **Study Objectives**

The study has several objectives:

- Identify empirical data on how zipper merging affects traffic flow, delay, and crash patterns across representative work zone configurations.
- Identify communication needs, including signing, enforcement strategies, and outreach approaches to support zipper merge implementation statewide.
- Develop recommendations identifying which corridor types, traffic volumes, and closure lengths are most suitable for zipper merge implementation.
- Identify implementation pathways, ranging from low-cost pilots to phased statewide adoption.
- Deliver study results by the July 15 TAC meeting, with STC approval in August.

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### **Scope of Work**

A four-task scope of work has been drafted to accomplish the study objectives, as follows.

#### **Task 1 – Project Management (April – July 2026)**

A task force will be assembled and chaired by TAC member John Kashatus. A kickoff meeting with task force members and PennDOT staff will be conducted to review and discuss the project scope, schedule, and relevant background materials. Progress updates will be provided to PennDOT staff on a monthly basis. The task force will meet three times over the course of the study process. Primary agenda items for these three meetings would include:

1. Kickoff and review of work plan; identify data sources and study success factors
2. Review of initial findings
3. Review/discuss draft/final white paper; make a recommendation to the TAC

#### **Task 2 – Literature Review and State of the Practice (April – May 2026)**

The team will conduct a targeted literature review and assessment of national and state practices related to zipper merging and work zone merging behavior and strategies. This

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### **Zipper Merge in Work Zones**

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review will encompass operational, safety, human-factors, communication, enforcement, and multimodal considerations relevant to zipper merge implementation. The review will include:

- Operational and safety research on zipper merge performance.
- Studies on driver behavior, psychology, risk perception, fairness, and social norms related to merging behavior.
- Federal Highway Administration (FHWA) guidance, human factors research, and national work zone best practices.
- State DOT case studies documenting operational outcomes, public acceptance, outreach campaigns, signing strategies, and enforcement practices.
- Multimodal considerations in work zones, including impacts on commercial vehicles, transit operations, pedestrians, cyclists, and emergency responders.

Additional sources will be consulted, including:

- National Highway Traffic Safety Administration (NHTSA) Fatality Analysis Reporting System (FARS);
- Bureau of Transportation Statistics (BTS) work zone fatalities and trends;
- FHWA's Work Zone Data Initiative (WZDI);
- SHRP2 Naturalistic Driving Study Analysis;
- Pennsylvania Crash Information Tool (PCIT);
- PennDOT's Crash Data Analysis and Retrieval Tool (CDART);
- Results of PennDOT's recent statewide survey on traffic safety and driving behavior;
- The 2022 Strategic Highway Safety Plan; and
- PennDOT District experience with relevant work zone practices.

This task may also include targeted interviews or short virtual meetings with lead adopters of zipper merge strategies, as well as selected practitioners such as PennDOT District staff, law enforcement partners, freight representatives, or transit agencies. These discussions would be limited in scope and used to validate key findings from the literature and gather practical insights on implementation, communication, and driver response. The review will be targeted and synthesized, not exhaustive, and will focus on insights directly relevant to understanding zipper merge feasibility, performance, and communication needs in Pennsylvania.

#### **Task 3 - Review of Contextual Factors (April- May 2026)**

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## **State Transportation Advisory Committee** **Zipper Merge in Work Zones**

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This task will examine Pennsylvania-specific factors that may influence zipper merge effectiveness and driver behavior, such as:

- Typical work zone layouts and signage practices.
- Urban vs. rural contexts.
- Freight traffic presence.
- Regional driving culture and expectations.
- Enforcement visibility, coordination, and consistency.

This task will rely on existing knowledge and professional experience rather than new data collection. The outcome will be a section of the white paper that clearly outlines Pennsylvania context considerations.

### Task 4 – White Paper Development and Finalization (May – August 2026)

The team will prepare a concise, well structured white paper (approximately 20-25 pages) written for a non-technical audience. The deliverable will incorporate graphics, diagrams, or callout boxes as appropriate to- explain behavioral concepts and findings.

A draft will be submitted to the Task Force and PennDOT staff for review and comment. A final version of the white paper will be presented to the TAC and the STC during their meetings for approval in July and August, respectively.