

**Bay Area Toll Authority
Oversight Committee**

November 9, 2022

Agenda Item 5b

Equity Action Plan Community Engagement Results

Subject:

Summary of the community engagement activities conducted in spring 2022 to support development of the Equity Action Plan.

Background:

At the May 2021 BATA Oversight meeting, staff unveiled an ambitious strategy to make the Bay Area tolling program more equitable through its Equity Action Plan. Staff provided updates at the October 2021, November 2021, January 2022, April 2022, June 2022 and October 2022 BATA Oversight meetings. At those meetings, Commissioners addressed the need for customers to be able to manage debt, to urgently focus on those who need debt relief most, and to include baseline data and cost/benefit analyses in assessments of potential policy changes. BATA has already made several policy changes:

- Dramatically reducing BATA violation penalties, and
- Reducing tag deposits, reducing the pre-paid balance for cash-paying customers to open a FasTrak® account, and eliminating cash payment network fees to make it more accessible and affordable to become a FasTrak® customer and manage accounts.

BATA also had begun policy development for a low-income payment plan to accompany its existing waivers. In September 2022, Assembly Bill 2594 (Ting) was signed into statute, requiring a payment plan and creating a one-time low-income waiver for outstanding penalties for toll evasion violations on a toll bridge occurring from March 20, 2020 to January 1, 2023 (COVID Waiver). The October 2022 staff update covered BATA's plans for implementing a low-income payment plan and the COVID Waiver.

In spring 2022, BATA also undertook a community engagement process to help guide elements of the Equity Action Plan. Objectives of the community engagement were:

- Develop a comprehensive understanding of the challenges Bay Area drivers face related to paying tolls;

- Identify which communities could benefit most from policy and program changes; and
- Assess public awareness and knowledge of bridge tolls, express lanes, and FasTrak® to inform a strategy to address equitable toll experiences for all Bay Area drivers.

Activities of the community engagement process were:

- Intercept surveys at the FasTrak® Walk-In Center and through 19 community-based organizations, with a focus on low-income neighborhoods and in multiple languages;
- Two combination online/phone surveys, one of bridge users and one of express lane users;
- Five virtual mixed-gender focus groups including White, Hispanic, Asian Pacific Islander and Black participants and including one focus group conducted in Spanish; and
- Six interviews with community advocate partners who have reported to BATA Oversight in earlier meetings the experiences of the clients they serve.

Findings:

Following are examples of the findings:

- More than half of survey and intercept respondents have FasTrak®. While some people did express reasons for not getting FasTrak®, most were somewhat or very likely to consider it. Focus group participants generally did not see the value of FasTrak®, and some who used it were concerned about the auto-replenishment. Equity partner interviews mentioned concerns about navigating customer service channels.
- Most survey and intercept respondents understand the invoice process for bridge tolls and have had a positive experience with invoices. There was some lack of awareness of the violation process among bridge survey respondents. Two-thirds have never had a violation, and of those who have, about half paid it on time. Half of all survey respondents with violations owed less than \$150.

- Most people are unaware of cash payment locations, but those who had used it were satisfied with the experience.
- Focus group bridge users reported confusion about the invoice process and negative experiences. Some wanted a pay-as-you-go option.
- Equity partner interviews revealed their clients have struggled with all-electronic tolling and would like toll takers back. They also reported difficulty with finding out what violation penalties are owed.
- There was general lack of awareness and understanding in the focus groups about how express lanes work, and some expressed a desire for an invoice or warning before getting a violation.
- Focus group participants liked the idea of a payment plan for all, although some preferred a plan for low-income individuals. However, they thought 200% of the federal poverty level was too low a threshold.

The conclusions of the community engagement have been organized into key learnings and takeaways, and BATA has identified what recommended actions are already completed or underway, and what actions might be considered for the future.

Next steps are to complete the detailed analysis of the community engagement results with a focus on low-income and equity priority communities. BATA also plans to continue conducting short-term community engagement research. Once programs have been implemented and produced data on usage, BATA will conduct additional research. Part of that will involve the development of performance metrics. BATA also will use the results to identify additional actions that can be taken within the next two years.

Issues:

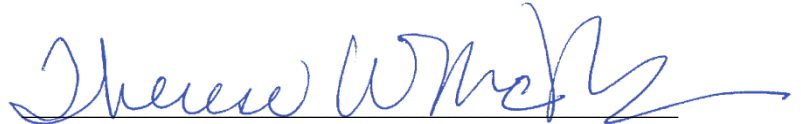
None identified.

Recommendations:

Information.

Attachments:

- Attachment A: Key Learnings, Takeaways, Current Actions and Future Considerations
- Attachment B: Presentation on FasTrak[®] Equity Action Plan Update

A handwritten signature in blue ink, appearing to read "Therese W. McMillan", written over a horizontal line.

Therese W. McMillan

Key Learnings, Takeaways, Current Actions and Future Considerations

Waivers and Payment Plans

Key Learning	Takeaway	Current Actions	Future Considerations
Support for payment plans is very strong for both low-income customers and all customers, regardless of income or ethnicity.	Payment plans are especially beneficial to low-income drivers who fall behind on unpaid tolls and find themselves in unmanageable amounts of debt. Plans would benefit all drivers, but reduced-fee programs based on income eligibility would help the most vulnerable.	<ul style="list-style-type: none">• Researched debt forgiveness (waivers) and payment plans• Developing one-time violation waivers to low-income drivers• Developing payment plans to low-income drivers	Explore other types of hardship and debt forgiveness program options based on experience once payment plan is implemented

Waivers and Payment Plans, continued

Key Learning	Takeaway	Current Actions	Future Considerations
There is consistent resistance about submitting detailed personal financial information (e.g., bank statements) for income verification to participate in a debt forgiveness (waiver) program. Concerns of personal privacy and security were common themes among survey and focus group participants.	Consider offering a payment plan to everyone and tailor the plan to the amount owed. Provide flexibility (such as grace periods, option to skip a payment, etc.). Limit the personal nature of the information required for eligibility/participation.	<ul style="list-style-type: none">• Developing payment plans for low-income drivers and using other programs to inform potential features	Research hardship and debt forgiveness programs, including income documentation requirements for eligibility

Customer Service

Key Learning	Takeaway	Current Actions	Future Considerations
Calling the Customer Service Center is the preferred way to resolve questions and issues, but customer service for both invoicing and FasTrak® is seen as poor. There are many complaints across ethnicities about difficulties reaching someone to fix invoice errors.	Improve customer service with additional training and bilingual staff who can serve all communities in a streamlined way. More research is needed to find out what language(s) are needed as well as which channels (phone, web, retail, etc.) could minimize the language barrier.	<ul style="list-style-type: none">• Increased capacity to respond to demand• Increased Spanish-speaking customer service representatives• Increased access to representatives who speak other languages• Installed a new phone system adding modern contact management tools	Provide ongoing refresher training to customer service representatives

Bridge Toll Invoices

Key Learning	Takeaway	Current Actions	Future Considerations
<p>Complaints about invoices:</p> <ul style="list-style-type: none">• Mailings are received too frequently• Hard to keep track of the total amount owed• Paying for individual invoices rather than being able to pay invoices as a lump sum.	<p>Extending the payment cycle to 30 days to be more in line with other household expense (utilities, rent, etc.) would be helpful. Provide the opportunity to pay in one monthly lump sum versus paying for invoices individually.</p>	<ul style="list-style-type: none">• In the process of extending invoice payment timeline from 21 to 30 days• Invoices are issued for a one-month period	<p>Promote awareness and enrollment in existing account types such as pay-as-you-go (license plate accounts) to improve invoice management</p>

Bridge Toll Invoices

Key Learning	Takeaway	Current Actions	Future Considerations
There is not enough distinction between the various notices. People are conflating “violation notices” and “bridge toll invoices.”	This confusion on what each notice is and happens next creates stress for drivers and exacerbates negative sentiment toward FasTrak®, MTC and Bay Area Toll Authority as a whole.	<ul style="list-style-type: none">• Current approach required by statute• Created a clear custom “Bridge Toll Invoice” template following All Electronic Tolling conversion• Created multilingual videos to help people understand the process	<ul style="list-style-type: none">• Conduct campaign to educate about invoices and violations