

ALFREDO PEDROZA, CHAIR  
*Chair of MTC and BATA*

AMY REIN WORTH, VICE CHAIR  
*BATA Oversight Committee Chair*

FEDERAL GLOVER  
*MTC Commissioner,  
Contra Costa County*

NATE MILEY  
*MTC Commissioner,  
Alameda County*

JIM SPERING  
*MTC Commissioner,  
Solano County and Cities*

VACANT  
*MTC Commissioner,  
California State  
Transportation Agency*

THERESE W. MCMILLAN  
*Executive Director*

ALIX BOCKELMAN  
*Deputy Executive Director, Policy*

ANDREW B. FREMIER  
*Deputy Executive Director, Operations*

BRAD PAUL  
*Deputy Executive Director,  
Local Government Services*

**CALL AND NOTICE OF Bay Area Infrastructure Financing Authority**

**9:40 a.m. Wednesday, October 13, 2021**

Bay Area Metro Center  
375 Beale Street, 1<sup>st</sup> Floor, Board Room  
San Francisco, CA 94105  
REMOTELY

**Special meeting of the Bay Area Infrastructure Financing Authority is scheduled to meet on Wednesday, October 13, 2021 at 9:40 a.m., or immediately following the 9:35 a.m. BATA Oversight Committee meeting, in the Bay Area Metro Center (Remotely). In light of Governor Newsom's State of Emergency declaration regarding COVID-19 and in accordance with the recently signed Assembly Bill 361 allowing remote meetings, this meeting will be accessible via webcast, teleconference, and Zoom for all participants. A Zoom panelist link for meeting participants will be sent separately to committee, commission, or board members.**

The meeting webcast will be available at <https://mtc.ca.gov/whats-happening/meetings/live-webcasts>.

**Members of the public are encouraged to participate remotely via Zoom at the following link or phone number.**

**Attendee Link: <https://bayareametro.zoom.us/j/85244615935>**

**iPhone One-tap: US: +16699006833,,85244615935# or +14086380968,,85244615935#**

**Join by Telephone (for higher quality, dial a number based on your current location) US:**

**+1 669 900 6833 or +1 408 638 0968 or +1 346 248 7799 or**

**+1 253 215 8782 or +1 646 876 9923 or +1 301 715 8592 or**

**+1 312 626 6799 or 888 788 0099 (Toll Free) or 877 853 5247 (Toll Free)**

**Webinar ID: 852 4461 5935**

**International numbers available: <https://bayareametro.zoom.us/j/85244615935>**

**Detailed instructions on participating via Zoom are available at: <https://mtc.ca.gov/how-provide-public-comment-board-meeting-zoom>. Committee members and members of the public participating by Zoom wishing to speak should use the "raise hand" feature or dial "\*9". In order to get the full Zoom experience, please make sure your application is up to date.**

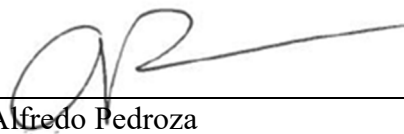
**Members of the public may participate by phone or Zoom or may submit comments by email at [info@bayareametro.gov](mailto:info@bayareametro.gov) by 5:00 p.m. the day before the scheduled meeting date. Please include the committee or board meeting name in the subject line. Due to the current circumstances there may be limited opportunity to address comments during the meeting. All comments received will be submitted into the record.**

**BAIFA Special Meeting Call and Notice**

**October 13, 2021**

**Page 2 of 2**

As Chair of the Bay Area Infrastructure Financing Authority (“BAIFA”), I am calling a special meeting of BAIFA for October 13, 201 at 9:40 a.m., or immediately following the 9:35 a.m. BATA Oversight Committee meeting, in the Bay Area Metro Center (Remotely). The business to be transacted will include: (1) Roll Call; (2) Consent Calendar; (2a) Minutes of the September 22, 2021 meeting; (2b) Contract – Express Lanes Toll Discount Pilot Marketing and Communications Services: Polytechnic Marketing LLC (\$325,000); (3) Information; (3a) I-880 Express Lanes Toll Discount Program Pilot Update; (4) Public Comment/Other Business; and (5) Adjournment/Next Meeting. Members of the public shall be provided an opportunity to directly address the Authority concerning any item described in this notice, before or during consideration of that item. An agenda will be posted and distributed for this meeting by MTC staff in the normal course.



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Alfredo Pedroza  
October 6, 2021

## Meeting Agenda

### Bay Area Infrastructure Financing Authority

*Authority Members:*

*Alfredo Pedroza, Chair      Amy Worth, Vice Chair*  
*Federal D. Glover, Carol Dutra-Vernaci, James P. Spering*  
*Non-Voting Member: Dina El-Tawansy*

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Wednesday, October 13, 2021

9:40 AM

REMOTE

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Special meeting of the Bay Area Infrastructure Financing Authority is scheduled to meet on Wednesday, October 13, 2021 at 9:40 a.m., or immediately following the 9:35 a.m. BATA Oversight Committee meeting, in the Bay Area Metro Center (Remotely). In light of Governor Newsom's State of Emergency declaration regarding COVID-19 and in accordance with the recently signed Assembly Bill 361 allowing remote meetings, this meeting will be accessible via webcast, teleconference, and Zoom for all participants. A Zoom panelist link for meeting participants will be sent separately to committee, commission, or board members.

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877 853 5247 (Toll Free) or 888 788 0099 (Toll Free)

Webinar ID: 852 4461 5935

International numbers available: <https://bayareametro.zoom.us/j/85244615935>

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Members of the public may participate by phone or Zoom or may submit comments by email at [info@bayareametro.gov](mailto:info@bayareametro.gov) by 5:00 p.m. the day before the scheduled meeting date. Please include the committee or board meeting name in the subject line. Due to the current circumstances there may be limited opportunity to address comments during the meeting. All comments received will be submitted into the record.

## 1. Call to Order / Roll Call / Confirm Quorum

*Quorum: A quorum of this Authority shall be a majority of its regular voting members (3).*

## 2. Consent Calendar

- 2a. [21-1200](#) Minutes of the September 22, 2021 meeting

Action: Authority Approval

Attachments: [2a - 21-1200 - Sept 22 BAIFA Draft Minutes.pdf](#)

- 2b. [21-1237](#) Contract - Express Lanes Toll Discount Pilot Marketing and Communications Services: Polytechnic Marketing LLC (\$325,000)

Action: Authority Approval

Presenter: Lysa Hale

Attachments: [2b - 21-1237 - Contract Polytechnic Marketing.pdf](#)

## 3. Information

- 3a. [21-1014](#) I-880 Express Lanes Toll Discount Program Pilot Update

Overview of customer research feedback and pilot concept for a means-based toll discount pilot on BAIFA's I-880 Express Lanes, including the recommended discount amount.

Action: Information

Presenter: Pierce Gould and Lysa Hale

Attachments: [3a - 21-1014 - I-880 EL Toll Discount Pilot Update.pdf](#)  
[3a - 21-1014 - I-880 EL Toll Discount Pilot Update-Presentation.pdf](#)

## 4. Public Comment / Other Business

## 5. Adjournment / Next Meeting

The next meeting of the Bay Area Infrastructure Financing Authority is scheduled to be held at 9:45 a.m. remotely and by webcast on \*\*\*the third Wednesday, November 17, 2021.\*\*\* Any changes to the schedule will be duly noticed to the public.

**Public Comment:** The public is encouraged to comment on agenda items at Authority meetings by completing a request-to-speak card (available from staff) and passing it to the Authority secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

**Meeting Conduct:** If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Authority may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

**Record of Meeting:** Authority meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site ([mtc.ca.gov](http://mtc.ca.gov)) for public review for at least one year.

**Accessibility and Title VI:** MTC provides services/accommodations upon request to persons with disabilities and individuals who are limited-English proficient who wish to address Commission matters. For accommodations or translations assistance, please call 415.778.6757 or 415.778.6769 for TDD/TTY. We require three working days' notice to accommodate your request.

**可及性和法令第六章：**MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

**Acceso y el Título VI:** La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

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Attachments are sent to Authority members, key staff and others as appropriate. Copies will be available at the meeting.

All items on the agenda are subject to action and/or change by the Authority. Actions recommended by staff are subject to change by the Authority.



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 21-1200      **Version:** 1      **Name:**  
**Type:** Minutes      **Status:** Authority Approval  
**File created:** 9/9/2021      **In control:** Bay Area Infrastructure Financing Authority  
**On agenda:** 10/27/2021      **Final action:**  
**Title:** Minutes of the September 22, 2021 meeting  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [2a - 21-1200 - Sept 22 BAIFA Draft Minutes.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**  
Minutes of the September 22, 2021 meeting

**Recommended Action:**  
Authority Approval

## Meeting Minutes

### Bay Area Infrastructure Financing Authority

**Authority Members:**

*Alfredo Pedroza, Chair      Amy Worth, Vice Chair*  
*Federal D. Glover, Carol Dutra-Vernaci, James P. Spering*  
*Non-Voting Member: Dina El-Tawansy*

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Wednesday, September 22, 2021

9:50 AM

Board Room - 1st Floor (REMOTE)

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#### Call Remote Meeting to Order

#### 1. Roll Call / Confirm Quorum

**Present:** 5 - Chair Pedroza, Vice Chair Worth, Commissioner Dutra-Vernaci, Commissioner Glover and Commissioner Spering

Non-Voting Member Absent: Commissioner El-Tawansy

#### 2. Consent Calendar

Upon the motion by Commissioner Spering and the second by Commissioner Dutra-Vernaci, the Consent Calendar was unanimously approved by the following vote:

**Aye:** 5 - Chair Pedroza, Vice Chair Worth, Commissioner Dutra-Vernaci, Commissioner Glover and Commissioner Spering

**2a.**     [21-1023](#)     Minutes of the July 28, 2021 meeting

**Action:** Authority Approval

**2b.**     [21-1086](#)     BAIFA Financial Statements for Fourth Quarter FY 2020-21 (Unaudited)

**Action:** Information

**Presenter:** Raymond Woo

#### **2c. US 101 Express Lanes Project in San Mateo County**

**2c.i.**     [21-1090](#)     Cooperative Agreement - US 101 Express Lanes Operations and Maintenance - San Mateo County Express Lanes Joint Powers Authority

**Action:** Authority Approval

**Presenter:** Stephen Wolf

- 2c.ii. [21-1088](#) Increase in Contract Contingency - Express Lane Toll System Integrator (TSI): TransCore, LP (\$1,000,000)

**Action:** Authority Approval

**Presenter:** Ken Hoang

### 3. Information

- 3a. [21-1091](#) I-880 Express Lanes Operations Report

A presentation on early operations of the I-880 Express Lanes.

**Action:** Information

**Presenter:** Barbara Laurenson

Aleta Dupree, Richard Hedges, and Roland Lebrun were called to speak.

### 4. Closed Session

- 4a. [21-1215](#) Closed Session Public Comment

- 4b. [21-1216](#) Closed Session - CONFERENCE WITH LEGAL COUNSEL-ANTICIPATED LITIGATION

The Authority met in closed session pursuant to Government Code Section 54956.9(a) and paragraph (2) of subdivision (d) of Government Code Section 54956.9 to confer with counsel regarding significant exposure to litigation: One Case.

### 5. Open Session

- [21-1217](#) The Authority reconvened in open session. General Counsel, Kathleen Kane reported that there were no reportable actions.

### 6. Public Comment / Other Business

### 7. Adjournment / Next Meeting

**The next meeting of the Bay Area Infrastructure Financing Authority is scheduled to be held on Wednesday, October 27, 2021 remotely and by webcast. Any changes to the schedule will be duly noticed to the public.**



## Legislation Details (With Text)

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**File #:** 21-1237      **Version:** 1      **Name:**

**Type:** Contract      **Status:** Authority Approval

**File created:** 9/16/2021      **In control:** Bay Area Infrastructure Financing Authority

**On agenda:** 10/13/2021      **Final action:**

**Title:** Contract - Express Lanes Toll Discount Pilot Marketing and Communications Services: Polytechnic Marketing LLC (\$325,000)

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [2b - 21-1237 - Contract Polytechnic Marketing.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**

Contract - Express Lanes Toll Discount Pilot Marketing and Communications Services: Polytechnic Marketing LLC (\$325,000)

**Presenter:**

Lysa Hale

**Recommended Action:**

Authority Approval

# Bay Area Infrastructure Financing Authority (BAIFA)

October 13, 2021

Agenda Item 2b - 21-1237

## Contract – Express Lanes Toll Discount Pilot Marketing and Communications Services: Polytechnic Marketing LLC (\$325,000)

**Subject:** This item would authorize a contract with Polytechnic Marketing LLC in an amount not to exceed \$251,000 for marketing and communications services for the Express Lanes Toll Discount Pilot Program.

**Background:** In December 2020, the Metropolitan Transportation Commission (MTC) Operations Committee approved an on-call bench of prequalified consultants to provide technical assistance for six categories: 1) Program Management, 2) Planning, 3) Operational Monitoring and Reporting, 4) Technology Oversight, 5) Communications and Customer Information Services, and 6) Compliance and Risk Management Services. The Request for Qualifications (RFQ) that governed the selection specified that MTC could directly assign work to a particular firm based on the nature of the work, expertise and availability of the firm(s) and staff of those firm(s) or could conduct informal solicitations among qualified firms to assist in assigning work. This bench may be utilized for a three-and-a-half year period ending June 30, 2024, with an option to extend for an additional two years. The RFQ authorized other public agencies, such as BAIFA, to obtain services from the bench contractors at the same terms and conditions provided to MTC.

In August 2021, BAIFA staff solicited proposals for consultant assistance related to the Express Lanes Toll Discount Pilot Program from all nine firms qualified under Category 5: Communications and Customer Information Services. BAIFA received two proposals on September 14, 2021 from Polytechnic Marketing LLC and MIG Inc in response to the Request for Qualifications. The proposals were evaluated by a panel of agency staff based on the following criteria: 1) Qualifications and Team Experience; 2) Approach to Completing the Project; 3) Cost Effectiveness, including reasonableness of hourly rates; and 4) Presentation, as evidenced in the written proposal.

The overall scores were as follows:

	Total out of 100
Polytechnic Marketing LLC	94.0
MIG Inc.	91.33

The work contemplated under this contract includes:

- 1) Communications strategies to support the launch and implementation of the Toll Discount Pilot Program including affected audiences, appropriate level of message and tone, appropriate channels of communication, and recommended strategies to implement messages.
- 2) Development and implementation of marketing campaigns to raise awareness of tolling and to promote the Toll Discount Pilot Program in the I-880 corridor.
- 3) Providing ongoing support of the Toll Discount Pilot Program in the areas of communications and customer education, including assistance with digital content, development of printed and other materials, and managing the Toll Discount Pilot Program's social media through the duration of the pilot.

The selected proposer is particularly strong in the areas of qualifications and team experience and approach to completing the project.


This item seeks approval to enter into a contract in the amount of \$325,000 for communications services through October 31, 2023.

Attachment A includes a summary of Polytechnic Marketing LLC's small business and disadvantaged business enterprise status.

**Issues:** None identified.

**Recommendation:** Staff recommends that the Committee authorize the Executive Director or designee to negotiate and enter into a contract with Polytechnic Marketing LLC in an amount not to exceed \$251,000 to provide marketing and communications services for the Express Lanes Toll Discount Pilot Program through October 31, 2023.

**Attachments:** Attachment A: Disadvantaged Business and Small Business Enterprise Status; and Summary of Proposed Contract

  
Therese W. McMillan

**Attachment A**

			<b>DBE* Firm</b>			<b>SBE Firm**</b>		
	<b>Firm Name</b>	<b>Role on Project</b>	<b>Yes</b>	<b>If Yes, List #</b>	<b>No</b>	<b>Yes</b>	<b>If Yes, List #</b>	<b>No</b>
Prime Contractor	Polytechnic Marketing LLC	Consultant Services			X	X	2013608	
Subcontractor								
Subcontractor								

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

## REQUEST FOR COMMITTEE APPROVAL

### Summary of Proposed Contract

Work Item No.:	6854
Consultant:	Polytechnic Marketing LLC Berkeley, CA
Work Project Title:	Express Lanes Toll Discount Pilot Program Marketing & Communications Services
Purpose of Project:	To provide marketing and communications services for the Express Lanes Toll Discount Pilot Program
Brief Scope of Work:	To develop and implement campaigns to educate people about the Toll Discount Pilot Program, to prepare updates to online and printed materials, and to conduct program research.
Project Cost Not to Exceed:	\$325,000
Funding Source:	BAIFA Capital Program Budget
Fiscal Impact:	Funds are included in the FY 2021-22 BAIFA Capital Program Budget
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract with Polytechnic Marketing LLC for marketing and communications services for the Express Lanes Toll Discount Pilot Program as described above and in the BAIFA Summary Sheet dated October 13, 2021 and the Chief Financial Officer is authorized to set aside \$325,000 for such contract.

BAIFA Operations  
Committee:

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Alfredo Pedroza, Chair

Approved: Date: October 13, 2021

## Legislation Details (With Text)

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<b>File #:</b>	21-1014	<b>Version:</b>	1	<b>Name:</b>	
<b>Type:</b>	Report	<b>Status:</b>		Informational	
<b>File created:</b>	7/21/2021	<b>In control:</b>		Bay Area Infrastructure Financing Authority	
<b>On agenda:</b>	10/13/2022	<b>Final action:</b>			
<b>Title:</b>	I-880 Express Lanes Toll Discount Program Pilot Update				

Overview of customer research feedback and pilot concept for a means-based toll discount pilot on BAIFA's I-880 Express Lanes, including the recommended discount amount.

**Sponsors:****Indexes:****Code sections:**

**Attachments:** [3a - 21-1014 - I-880 EL Toll Discount Pilot Update.pdf](#)  
[3a - 21-1014 - I-880 EL Toll Discount Pilot Update-Presentation.pdf](#)

Date	Ver.	Action By	Action	Result
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**Subject:**

I-880 Express Lanes Toll Discount Program Pilot Update

Overview of customer research feedback and pilot concept for a means-based toll discount pilot on BAIFA's I-880 Express Lanes, including the recommended discount amount.

**Presenter:**

Pierce Gould and Lysa Hale

**Recommended Action:**

Information

# Bay Area Infrastructure Financing Authority (BAIFA)

October 13, 2021

Agenda Item 3a - 21-1014

## I-880 Express Lanes Toll Discount Program Pilot Update

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**Subject:** Overview of customer research feedback and pilot concept for a means-based toll discount pilot on BAIFA's I-880 Express Lanes, including the recommended discount amount.

**Background:** Nationally, the Toll Discount Program pilot would be a first-of-its-kind effort to address affordability of express lane tolls for residents earning a low-income. For most Bay Area households, transportation is the third-biggest monthly expense – trailing only the cost of housing and food. The pilot responds to policymaker, advocate, and public comments received about express lanes: during the project performance evaluation phase of Plan Bay Area 2050; at Commission and Policy Advisory Council Equity & Access Subcommittee meetings; and at public hearings to amend BAIFA's toll ordinance for I-880 and the I-680 Express Lanes extension. The pilot would leverage the systems, services, policies and lessons from Clipper® START<sup>SM</sup>, the means-based transit fare discount program.

MTC staff last updated BAIFA in March 2021. Since then, the pilot team has:

- Conducted stakeholder outreach with MTC's Policy Advisory Council Equity & Access Subcommittee and the pilot Advisory Group, composed of partner agencies and advocacy organizations;
- Conducted customer research;
- Refined the concept for how the pilot should work;
- Developed a draft pilot evaluation plan;
- Coordinated closely with BATA staff vis-a-vis the BATA Equity Action Plan, and
- Begun negotiating change orders and executing contract amendments for key systems and operations work.

This update presents for BAIFA's feedback the results of customer research feedback and resulting pilot concept.

### Customer Research Feedback

Consistent with the 'Listen and Learn' and 'Define and Measure' pillars of MTC's Equity Platform, community engagement for the pilot is being undertaken in three broad contexts, with particular focus on low-income communities, including low-income communities of color:

1. Community engagement on how the pilot should work;
2. Community engagement on how to reach and inform potential customers about the pilot; and

3. Community engagement on how customers experience the pilot during operations.

At the October BAIFA special meeting, staff will present feedback from customer research with FasTrak<sup>®</sup> and non-FasTrak<sup>®</sup> users on pilot design (#1) and outreach (#2) above. In July and August 2021, staff conducted three Zoom-based focus groups in English, Spanish and Cantonese each (nine total) and one multilingual telephone town hall, which is a way for people without access to computers or the internet to participate.

Key feedback is that focus group participants:

- Have questions about how express lanes work;
- Have concerns about express lanes with regards to equity;
- Think eligibility should be similar to other low-income programs such as CalFresh (which is how Clipper START works, too);
- Feel proposed income thresholds are too low and that too few people will qualify;
- Think a 50% discount makes the most sense as it is easy to quickly calculate;
- Support an annual or biannual eligibility renewal process;
- Want to see the discount toll relative to the full toll on their FasTrak<sup>®</sup> statements;
- Believe it will be difficult for people who can only pay cash to participate;
- Think a cumbersome application process or lack of access to technology could be barriers; and
- Provided a wide range of suggestions about how to educate about and promote the program, including direct mail, newspapers, social media and places like schools and Latino markets.

Customer research feedback has helped define key aspects of the pilot concept and would be factored into outreach plans. During pilot operations, more focus groups and surveys would be conducted to gather feedback from pilot participants about their experiences with the pilot, which would support its evaluation and lessons learned. A comprehensive evaluation plan that would help gauge pilot outcomes will be reviewed with BAIFA in winter 2021/22. The evaluation would assess customer experience and outcomes, lane performance, and administrative and financial viability.

### **Pilot Concept**

A draft concept for how the pilot could work was developed by staff and reviewed with the pilot stakeholders as well as with potential pilot customers as described above. Key features, which are consistent with the Clipper START transit fare discount program where applicable, are:



- The pilot would only apply to BAIFA's I-880 Express Lanes.
- Income-qualified customers (household income equal to 200% of the federal poverty level or less) with a FasTrak<sup>®</sup> account and a Bay Area mailing address would be eligible to receive a discount on tolls.
- Customers would apply via the pilot website or on paper and must be verified as meeting eligibility requirements. A wide variety of documentation to prove identity and household income would be accepted. If a customer already has a FasTrak<sup>®</sup> account, the discount plan would be automatically applied. If not, they would need to open a FasTrak<sup>®</sup> account first. Toll discounts would only be provided after the discount plan is applied to the FasTrak<sup>®</sup> account.
- The toll discount would be 50% off standard toll rates for 1-person vehicles, 2-person carpools and clean air vehicles (CAVs). As a result, a pilot participant would receive 50% off a 1-person trip toll and 75% off a 2-person or CAV trip toll. Three-or-more-person carpools always travel toll-free.
- The toll discount would apply to all toll tags and license plates linked to a FasTrak<sup>®</sup> account with the discount plan, and there would be no limits on the number of toll tags or license plates per account.
- The monthly FasTrak<sup>®</sup> statement would show the standard toll and a credit for the discount for each tolled trip in the I-880 Express Lanes.

Importantly, the BATA Equity Action Plan, to be presented to the BATA Oversight Committee in October, includes significant measures that complement the BAIFA pilot by making FasTrak<sup>®</sup> more accessible to low-income customers. It will be important to align the timing of these efforts. In particular, some measures, such as a reduction in violation penalties for BAIFA's express lanes would require action by BAIFA. Other measures, such as reduced tag deposits and opening account balances are FasTrak<sup>®</sup> policies that flow directly to all Bay Area FasTrak<sup>®</sup> customers.

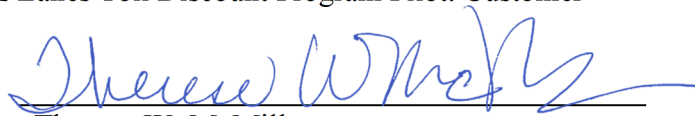
Later this year, staff will launch public outreach including a public hearing prior to BAIFA's consideration of an amendment to its toll ordinance. The toll ordinance amendment, anticipated in the first quarter of 2022, would represent BAIFA's formal approval to launch a pilot as well as any changes to violation penalties.

Based on the above, the current schedule would see the pilot launched in May 2022, but staff continues to monitor risks that could affect this date.

**Issues:** None

**Recommendation:** This item is provided for information only.

**Attachments:** Presentation – I-880 Express Lanes Toll Discount Program Pilot: Customer  
Research & Concept

  
Therese W. McMillan



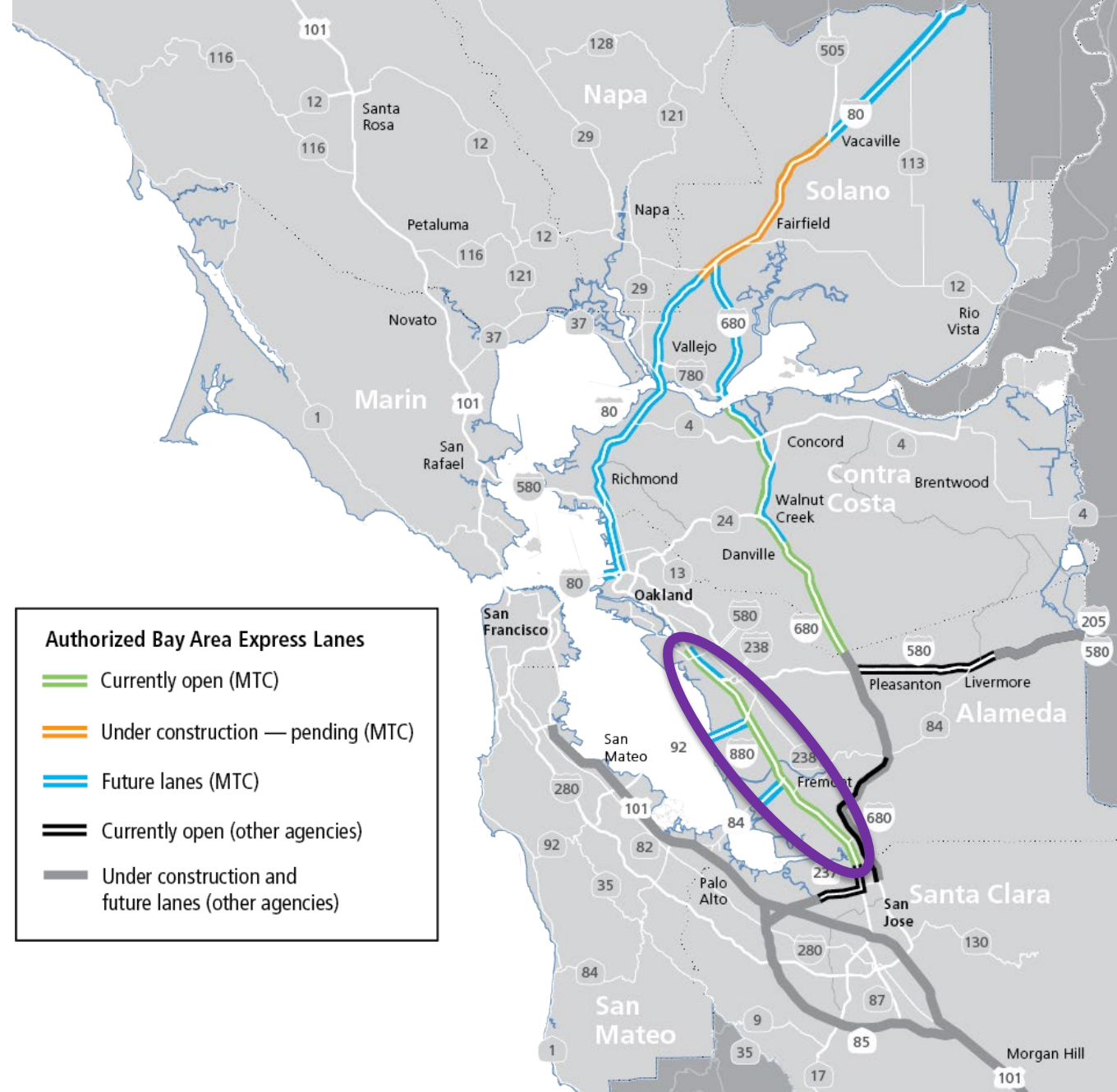
# I-880 Express Lanes Toll Discount Pilot: Customer Research & Concept

Pierce Gould & Lysa Hale

October 13, 2021

# Overview

- Transportation is third-largest budget item for low-income households
- Issue: express lanes costs for low-income drivers serve as a barrier where transit may not be a viable option
- Expand mobility and access to opportunity with a means-based toll discount
- Leverage tools, rules and lessons of Clipper<sup>®</sup> START<sup>SM</sup> pilot
- Advance and apply an equity approach



# Synergies with Clipper START pilot

## Clipper START

### Pilot Locations

- 10 transit agencies (incl. BART, Caltrain, Golden Gate, SF Muni); +11 by Jan 2021

### Eligibility

- Adults earning 200% or less of federal poverty level (~\$52,000 for family of four)

### Implementation

- Offered through Clipper<sup>®</sup>
- Duration: 18 months
- Centrally administered: Customer services systems and eligibility contractor
- Outreach: Social service agencies, community-based organizations & advertising

## BAIFA Pilot

### Pilot Location(s)

- BAIFA I-880 express lanes

### Eligibility

- Adults earning 200% or less of federal poverty level (~\$52,000 for family of four)

### Implementation

- Offered through FasTrak<sup>®</sup>
- Duration: est. 18 months
- Centrally administered: Customer service systems and eligibility contractor
- Outreach: Social service agencies, community-based organizations & advertising

# Methodology

- 3 focus groups with FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- 3 focus groups with non-FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- 3 focus groups with a mix of FasTrak<sup>®</sup> and non-FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- Telephone town hall in English with simultaneous translation in Spanish and Cantonese

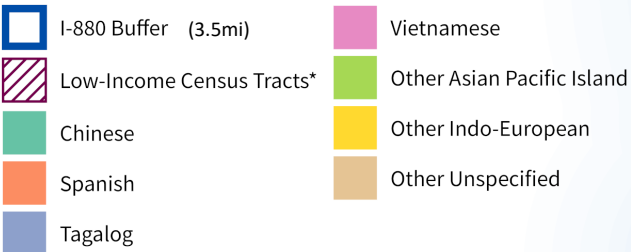




# Multilingual Engagement & Outreach

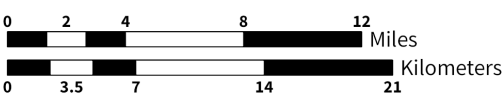
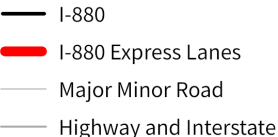
## I-880 Express Lanes Toll Discount Pilot

Limited English Proficiency Population  
and Language Spoken at Home



\*A Low-Income Tract is any tract where the share of the population earning less than 200% of the Federal Poverty Level (FPL) is greater than 28% of the total population for whom poverty status is determined. This threshold was set as part of MTC's 2020 Communities of Concern Framework update.

### REGIONAL TRANSPORTATION



Source: TomTom North America (2019);  
American Community Survey 5-Year Estimates (2014-2018)  
Map Author: JC, March 2021

San Francisco

Daly City

South San Francisco

San Mateo

San Mateo

Redwood City

Hayward

San Leandro

Oakland

Alameda

San Ramon

Pleasanton

Alameda

Union City

Fremont

Milpitas

Sunnyvale

Mountain View

Santa Clara

Palo Alto

Cupertino

San Jose

Berkeley

# Focus Group Recruitment & Composition

- Low Income
- Household size
- Live in 880 corridor
- Drives 880
- Race
- Gender Identity
- Age
- Multilingual
- Banked and unbanked
- Employed and not employed
- FasTrak<sup>®</sup> and No FasTrak<sup>®</sup>

Focus Group	Asian & Pacific Islander	Black or African American	Hispanic or Latino	White Non-Hispanic	Other*	Male	Female	Total
1A	10	1	9	4	1	8	17	25
1B	10	4	8	4		12	14	26
2	11	3	11	1	2	8	20	28
Total	31	8	28	9	3	28	51	79

\*American Indian or Alaska Native (1); Middle Eastern (1); Multi-Racial (1)



# Feedback – Express Lanes

- General confusion about using the lanes
- Most likely to use for commute trips
- Some consider to be expensive/unnecessary
- Toll discount would make some more likely to use lanes
- Concerns about equity of tolling



# Feedback – Discount Eligibility

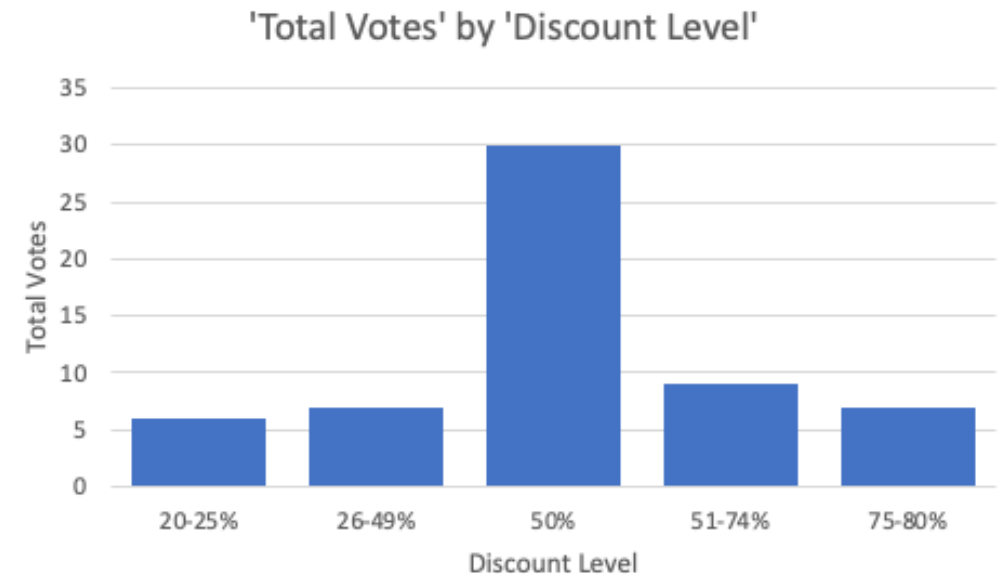
- Automatic eligibility based on other programs
  - Consistent with Clipper<sup>®</sup> START<sup>SM</sup> eligibility
- Proposed income levels are too low
  - Not sure program will be that helpful



# Feedback – Discount Program Features

- 50% discount makes the most sense
- Annual or biannual renewal
- No consensus on toll tag limits
- Ability to see both discount and full toll on FasTrak<sup>®</sup> statement

## Focus Group Results (59 Responses)



# Feedback – Barriers to Participation

- Affordability
- Cumbersome application process
- Internet/technology access
- Providing financial information



# Feedback – Outreach Suggestions

- Existing channels
  - e.g., childcare centers, AAA, BART
- Culture-specific strategies
  - e.g., Latino/a/x markets, libraries, clinics, schools, CBOs
- Billboards
- Direct mail in Spanish and Chinese
- In-language newspapers
- Social media
- Job search websites



# Eligible drivers pay less in the I-880 Express Lanes

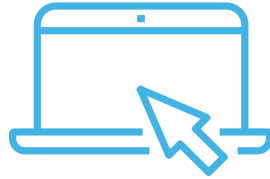


# Simple enrollment process





# How do customers apply?



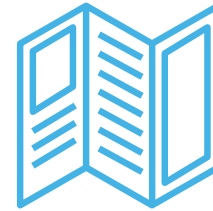
COMPUTER

OR



MOBILE

OR



BROCHURE

## Requirements



PROOF OF  
IDENTITY



PROOF OF  
HOUSEHOLD INCOME  
(below 200% Federal  
poverty level)



BAY AREA MAILING  
ADDRESS



ANSWER SURVEY  
QUESTIONS

*Note: Vehicle ownership not required*



# Acceptable documentation — scan or take a photo

## PROOF OF IDENTITY (need one)

- ▶ Driver's License
- ▶ State ID Card
- ▶ Passport
- ▶ City ID Card
- ▶ Permanent Resident Card
- ▶ US Military Card
- ▶ Matricula Consular Card



## PROOF OF HOUSEHOLD INCOME (need one\*)

- ▶ Electronic Benefits Transfer (EBT) Card
- ▶ Medi-Cal Card
- ▶ SFMTA Lifeline Pass
- ▶ County Benefits Eligibility Letter
- ▶ Tax Form

*\*if already approved for Clipper® START<sup>SM</sup>, no need to resubmit proof of income (and vice versa)*

A sample 1040 U.S. Individual Income Tax Return form for the year 2018. The form displays the word "SAMPLE" in large, diagonal, semi-transparent letters. It includes fields for taxpayer information, income, deductions, and credits.

# What would the toll discount be?

I-880 Express Lanes	SOV	HOV2	CAV	HOV3+
Standard Toll Rates	Full toll	50% off	50% off	No toll
Income Qualified Toll Rates	50% off	75% off*	75% off*	No toll

*\*50% off the standard toll rate of 50% off for HOV2 or Clean Air Vehicle (CAV) equals 75% off the full toll*

- Meaningful discount supported by focus group participants
- Simple public message: 50% off all tolled trips
- Easy to calculate, allowing drivers to focus on road
- Incentivizes carpools and clean air vehicles (CAVs)

# What are important pilot features and why?

Feature	FasTrak® Consistency	Focus Group Feedback
1. Discount would be 50% off <u>all tolled trips</u> (SOV, HOV2, CAV) for Bay Area residents		✓
2. Discount would be account-based (applies to all toll tags/license plates linked to account; discount given if no toll tag read)	✓	✓
3. No limit on number of toll tags/license plates per account	✓	✓
4. FasTrak® statement would show the standard toll and a credit for the discount for each tolled trip		✓
5. Tag deposit, minimum balance, violation process and cash payment options would be the same for all FasTrak® customers	✓	
6. Program staff would monitor unusual account and trip activity periodically via program reports and queries		

# Pilot Schedule Update

Work Area	2020	2021				2022				2023		
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Planning & Contracts												
Pilot Design												
Technical Systems												
Toll Ordinance												
Data & Evaluation												
Operations												
Customer Outreach												

Today

- Toll Ordinance: coordinate schedule with FasTrak® Equity Action Plan
- Future BAIFA presentation topics: Evaluation Plan & Outreach Plan
- Current pilot launch: Q2 2022