



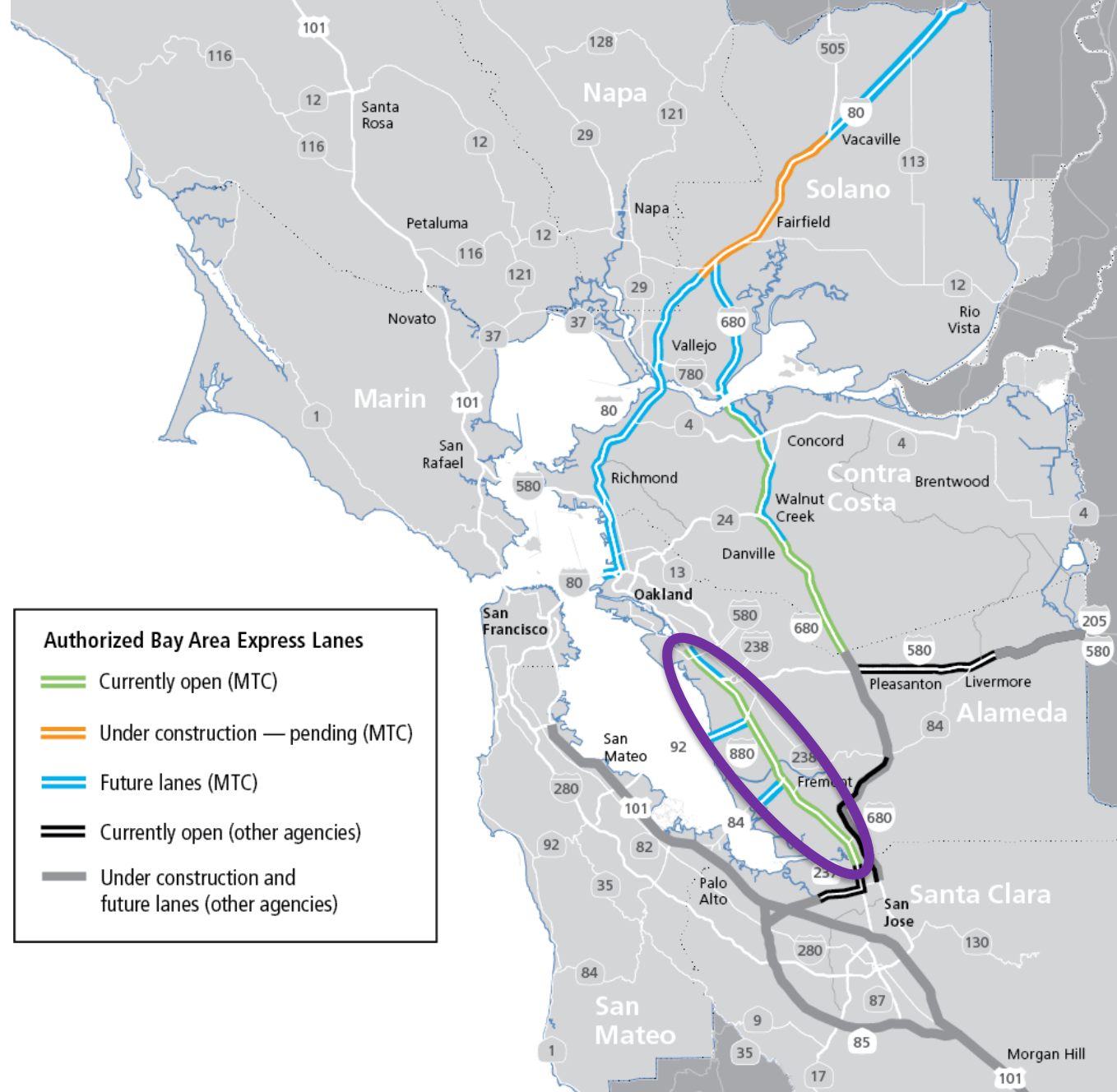
# I-880 Express Lanes Toll Discount Pilot: Customer Research & Concept

Pierce Gould & Lysa Hale

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# 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

- 21 transit agencies

### Eligibility

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

### Implementation

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

# Methodology

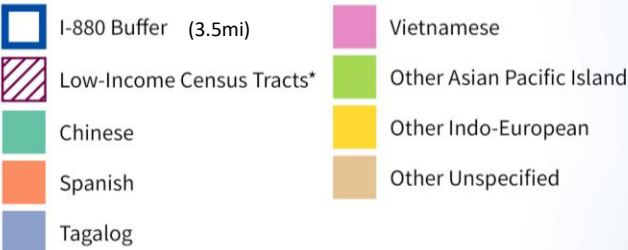
- 3 focus groups with FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- 3 focus groups with non-FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- 3 focus groups with a mix of FasTrak<sup>®</sup> and non-FasTrak<sup>®</sup> users – English, Spanish and Cantonese
- Telephone town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



# Multilingual Engagement & Outreach

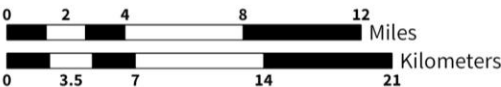
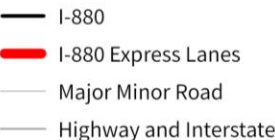
## I-880 Express Lanes Toll Discount Pilot

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

Union City

Alameda

Pleasanton

San Ramon

Mountain View

Sunnyvale

Milpitas

Santa Clara

Palo Alto

Cupertino

San Jose

# 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>

*Note: Staff will conduct one additional focus group with Black/African American participants.*

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
<b>Total</b>	<b>31</b>	<b>8</b>	<b>28</b>	<b>9</b>	<b>3</b>	<b>28</b>	<b>51</b>	<b>79</b>

*\*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

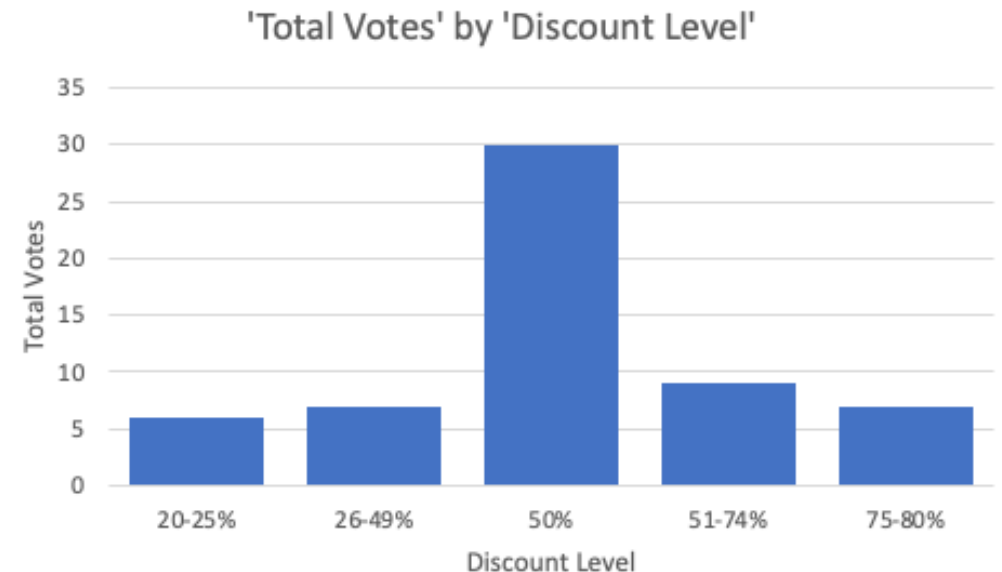
- Automatic eligibility based on other programs
  - Consistent with Clipper<sup>®</sup> START<sup>SM</sup> eligibility
- Proposed income levels are too low
  - Not sure program will be that helpful



# 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
- Follow-up with Black/African American community about outreach suggestions
- Billboards
- Direct mail in Spanish and Chinese
- In-language newspapers
- Social media
- Job search websites



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



# Simple enrollment process



# How would customers apply?



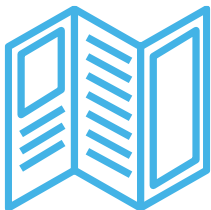
COMPUTER

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 is filled out with sample information, including the taxpayer's name, address, and income details. The word "SAMPLE" is written in large diagonal letters across the form.

# 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: opportunity for public comment on pilot prior to approval
- Future BAIFA presentation topics: Evaluation Plan & Outreach Plan
- Current pilot launch: Q2 2022