

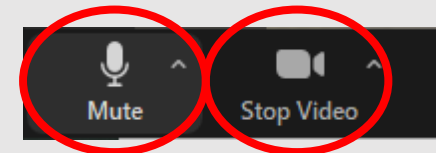
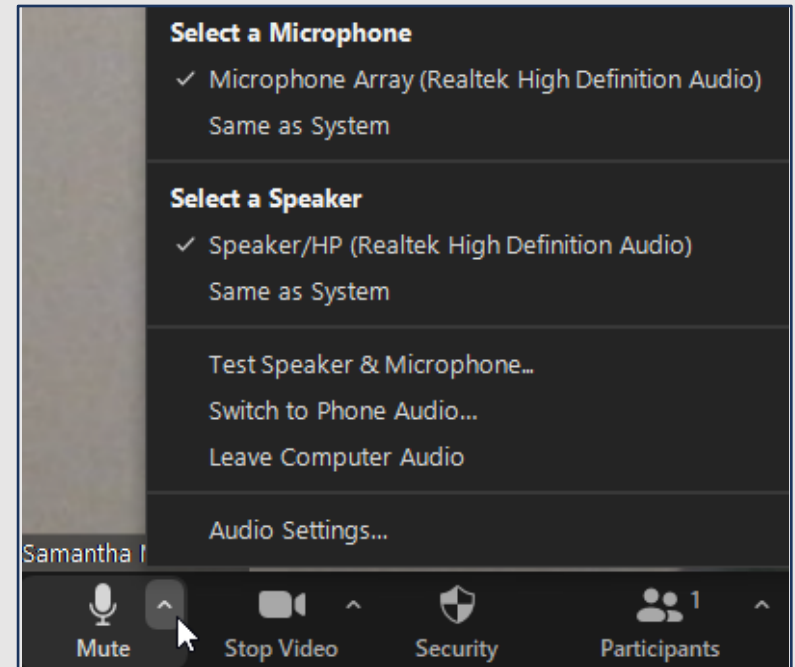
STATEWIDE TOLL RULEMAKING ADVISORY COMMITTEE (STRAC) & EQUITY AND MOBILITY ADVISORY COMMITTEE (EMAC)

Meeting #6
July 21, 2023

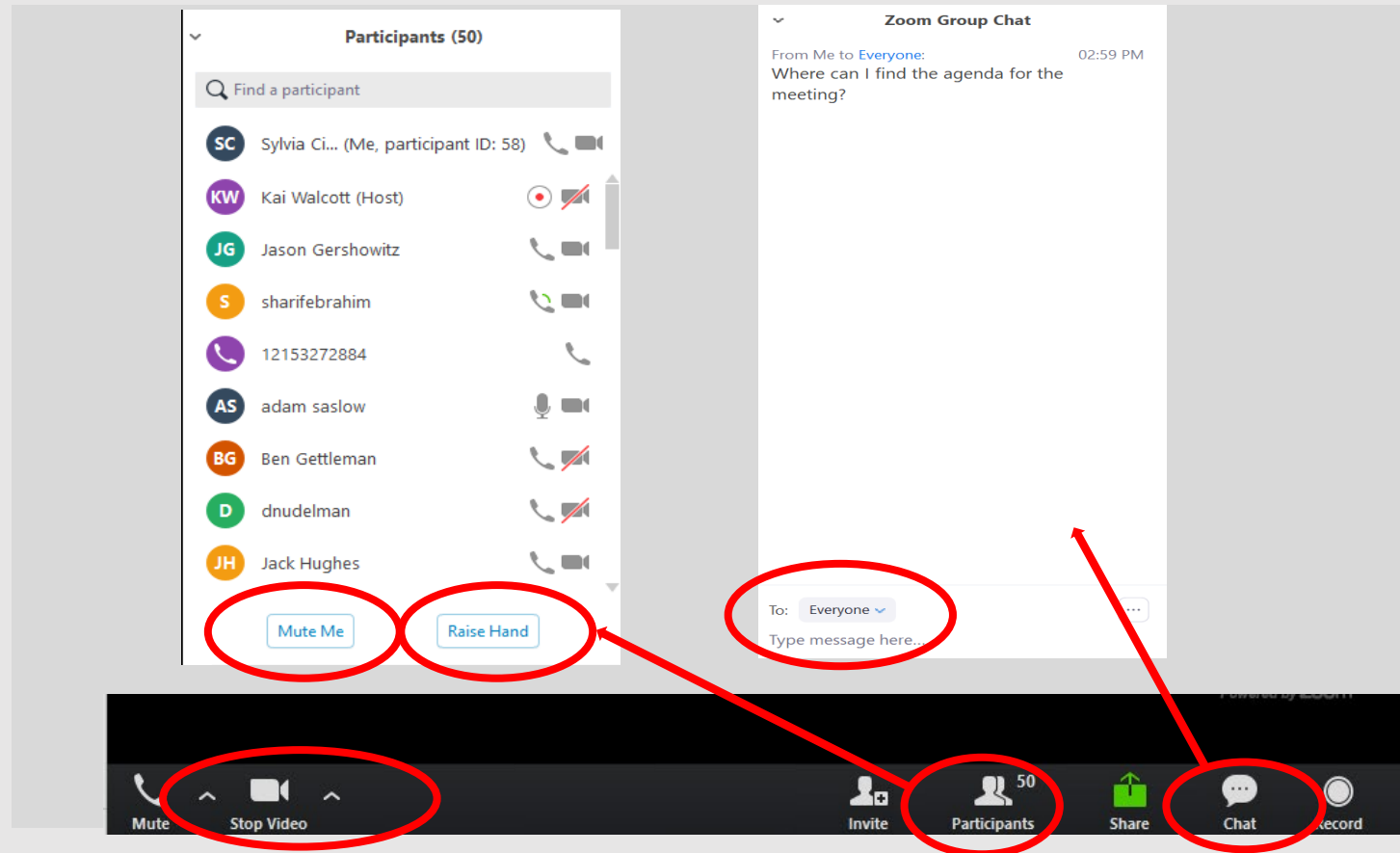
ZOOM MEETING TIPS FOR STRAC MEMBERS

- If you have not already **connected your audio**, click on the arrow next to the microphone icon, then click “Join Computer Audio” or “Switch to Phone Audio” to connect your computer speakers or to view the conference line information.
- Please **keep yourself on mute** when not speaking. To mute and unmute, either select the microphone icon, or use your personal phone.
- **Use video** if possible, to promote face-to-face communication. Click the video icon to turn on your webinar camera.

If you are experiencing technical difficulties, please send a text to Madeline Kane at (719)209-5138.



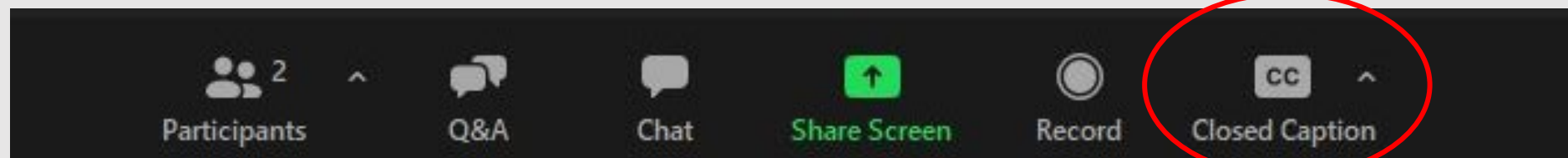
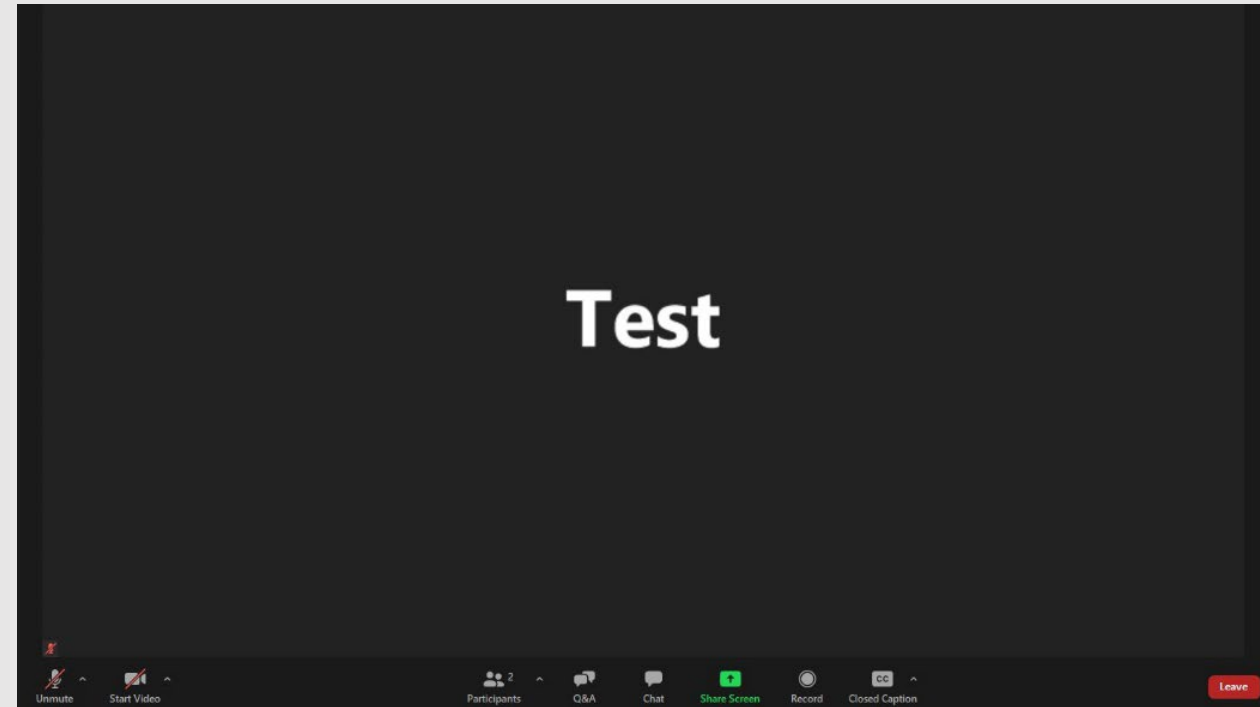
ZOOM MEETING TIPS FOR STRAC MEMBERS



- To raise your hand by phone, press *9
- To unmute yourself by phone, press *6

HOW TO ACCESS CLOSED CAPTIONS

1. At the bottom middle of your screen, you should see a menu of options. If you can't see the menu, hover your mouse over the bottom middle of the screen.
2. Click on the "CC" icon and a separate window with captions will appear.



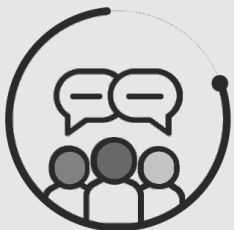
HOW TO COMMENT



For STRAC comments, please email oregontolrules@odot.oregon.gov with “STRAC Public Comment” in the subject line.



Submit comments via phone: 503-837-3536.



Comments received by 11:00 AM two business days before each meeting will be shared with advisory committee members before the meeting. All comments will be added to the meeting record.

AGENDA

- **9:00 am:** Opening & Introductions
- **9:20 am:** Welcome
- **9:30 am:** Where We've Been & Where We're Going
- **9:40 am:** What We've Heard
- **10:40 am:** Working Together Across Differences
- **11:10 am:** Break
- **11:15 am:** Regulations, Policies, Existing Practices and Challenges
- **11:45 am:** Looking Ahead and Next Steps
- **11:55 am:** Next Steps & Thank You₆

INTRODUCTION

- Name
- Committee
- Organization/Interest

MEETING GUIDELINES



Fully participate in Work Group meetings



Come prepared for meetings



Participate in an open and mutually respectful way



Balance speaking time



Serve as a liaison to your larger community of interest



Act in good faith – Listen and be respectful of others' contributions

MEETING OBJECTIVES

- **Deepen an understanding** of the rulemaking part 2 topics (low-income tolls, discounts and exemptions, vehicle rates by types, toll rate setting and adjustment), by reviewing and discussing past feedback, decisions, regulations, and existing practices from other toll programs.
- **Discuss the opportunities, challenges, tradeoffs, and questions** for these topics.
- **Review the draft rules outline, and the regulations and policies** that inform it.
- **Clearly understand the roles of the toll committees** in the next steps of rule development.

TRIVIA

There is a toll facility in Europe which is named after the original toll charged. What facility is it?

- A. The "Quarter Pounder" toll way in England (£.25)
- B. The "Ha'penny" bridge in Ireland (half a penny)
- C. The "Makes No Cents Tunnel" in Scotland (was originally free)
- D. The "High Fiver" turnpike in Wales (€5.00)

TRIVIA



B. The Ha'Penny Bridge in Dublin Ireland.

- Officially known as the Liffey Bridge was built in 1816 to cross the River Liffey.
- The original toll to cross the pedestrian bridge was $\frac{1}{2}$ pence.
- The bridge is now free to cross

WELCOME



Travis Brouwer

Assistant Director of Revenue, Finance, and
Compliance

Oregon Department of Transportation

URBAN MOBILITY STRATEGY FINANCE PLAN UPDATE

- Delivered to the Governor July 1
- Lays out costs of UMS projects, timelines, and potential funding sources
- Total program cost \$3.7-4.4 billion
- Commission approved first \$1.1 billion in funding from HB 2017 and I-205 tolls
- Priorities include:
 - Completing I-205 Abernethy Bridge
 - Moving forward on Rose Quarter design
 - Completing preliminary planning for I-5 Boone Bridge
 - Standing up tolling



IMPLEMENTATION REPORTS

- "This revised start date will allow time for my office, the Oregon Transportation Commission, and the legislative Subcommittee on Transportation Planning to receive more information on the agency's plans to mitigate diversion and address equity concerns."
 - Governor Kotek, Letter from May 4, 2023
- Due to the Governor by December 15, 2023

LOW-INCOME TOLL PROGRAM: PREPRATION FOR THE IMPLEMENTATION REPORT

1. OTC adopts a set of rules OARs for low-income toll program (identify the enrollment and verification system, as well as the steps in toll rate setting and adjustment)
2. ODOT commits to a substantial discount for up to 200% Federal Poverty Level (FPL) and models it in the Level 3 Traffic and Revenue (T&R) analysis, with the intent of implementing

LOW-INCOME TOLL PROGRAM: PREPRATION FOR THE IMPLEMENTATION REPORT

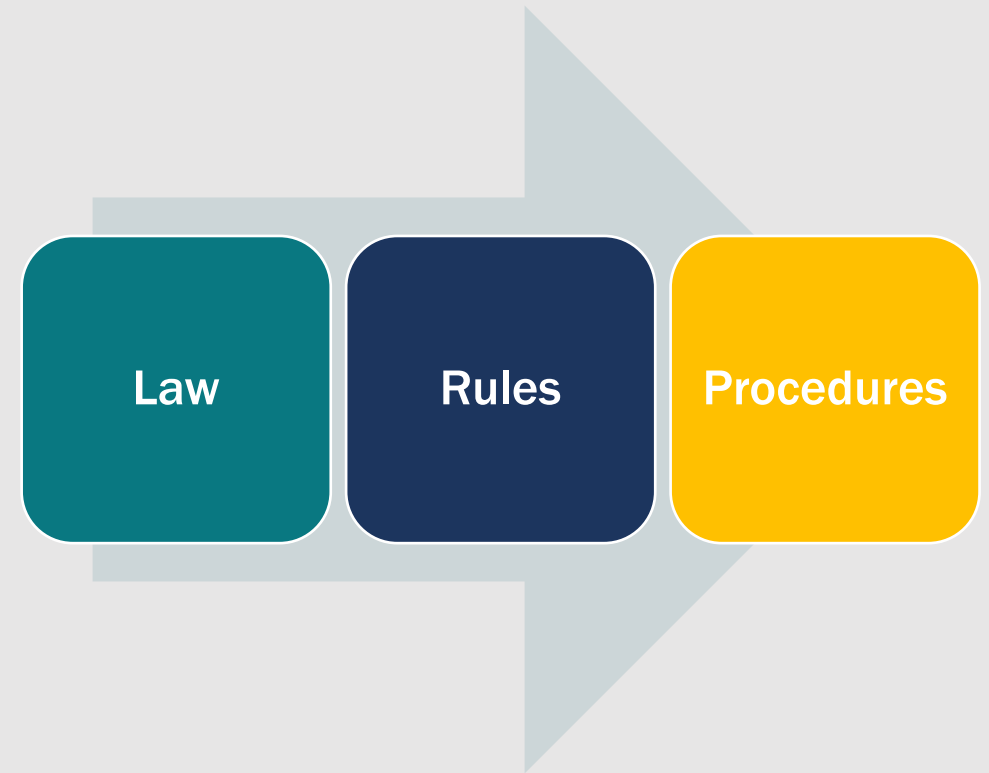
3. OTC provides direction on a possible benefit for 200-400% FPL; if this option advances, identify scenarios to analyze in greater depth in the Level 3 Traffic and Revenue analysis
4. ODOT commits to scope and budget for Community-Based Organization (CBO) involvement in supporting enrollment leading up to toll start

WHERE WE'VE BEEN & WHERE WE'RE GOING



WHAT ARE OREGON ADMINISTRATIVE RULES (OARs)?

- Not detailed procedures
- Existing toll rules need an overhaul
- The State of Oregon has a process that involves public comment, Department of Justice, and Secretary of State





EMAC STATEMENT OF PURPOSE



- Neighborhood health and safety
- Low-income
- Transit and multimodal

Providing input directly to the Oregon Transportation Commission, EMAC was convened in 2020 to ensure equitable toll project processes and outcomes

EMAC & STRAC COORDINATION

TIMELINE: TOLL RULES UPDATE (OARs)



2023

2024

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

STRAC

Part 1: Enrollment, payment processing, and enforcement

Part 2: Low-income toll program, rate setting and adjustment process, and vehicle rates

Public

Equity focused discussion groups

Public outreach, specialty groups (freight, etc.), and equity-focused discussion groups

Public comment period

ODOT

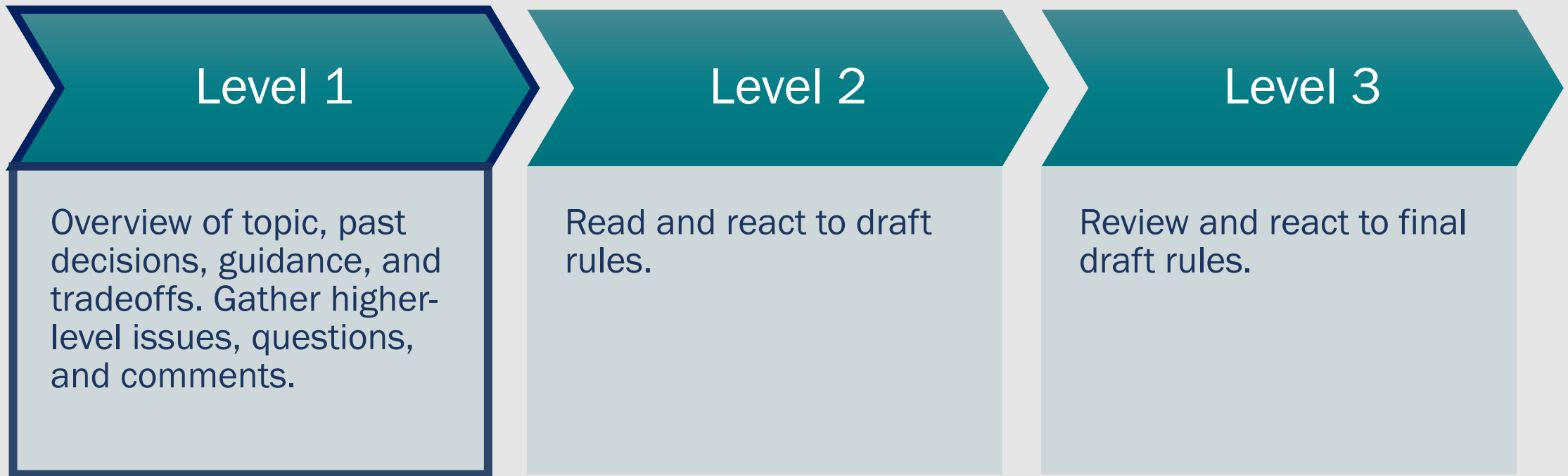
Draft and revise the draft rules and create supportive materials for engagement

OTC

Provide feedback on draft rules and challenging topics

Review & approve

STRAC & ODOT ENGAGEMENT PROCESS



WHAT WE'VE HEARD





SUMMARY OF FEEDBACK

- EMAC and the Low-Income Toll Report
- Community and equity-focused engagement (2020 to 2023)



Summary of Feedback:

Low-Income Tolls, Vehicle Rates, Discounts/Exemptions, and Toll Rate Setting and Adjustments

STRAC & EMAC July 21 Joint Workshop Materials

Date Updated: July 14, 2023

This document contains a summary of the feedback received to date by the Equity and Mobility Advisory Committee (EMAC) and by engagement efforts for the I-205 Toll Project and Regional Mobility Pricing Project. The feedback below represents key takeaways ODOT has heard to-date on the following topics:

- Low-income tolls
- Rates for different vehicle types
- Discounts and exemptions
- Toll rate setting and adjustments

Equity and Mobility Advisory Committee

The Equity and Mobility Advisory Committee (EMAC) advises ODOT and the Oregon



SUMMARY OF FEEDBACK

Toll rate setting and adjustments considerations:

- Users and trip types
- Rates by location
- Toll rate complexity
- Adjustments based on multiple factors

Discounts and exemptions considerations:

- Communities disproportionately impacted
- Communities unable to change travel times
- Certain populations, income levels, and underserved communities
- Concerns of fairness



SUMMARY OF FEEDBACK

Rates for different types of vehicles

- Consideration of different rates
 - Freight
 - Non-single occupant vehicles (carpools and rideshares)
 - Electric vehicles
 - Motorcycles
 - Frequent users
 - Medical vehicles



WHAT WE'VE HEARD: PANEL DISCUSSION

EMAC

- Phil Wu
- James Paulson
- Jessica Stanton

STRAC

- Elizabeth Mazzara Myers
- Ethan Hasenstein
- Mike Card

Working Together Across Differences





WORKING TOGETHER ACROSS DIFFERENCES

- Understanding and working with interests versus positions
- Working within an Equity Framework
- Tools for challenging discussions: Listening and Inquiry
- Importance of relationships

REPRESENTED INTERESTS

- Small and Local Business
- National and Regional Business
- Construction
- Freight and Trucking
- Agriculture
- Emergency Response
- Equity
- Minority and Woman Owned Businesses
- Tourism
- Public Safety
- Commuter





Equality



The assumption is that **everyone benefits from the same supports**. This is equal treatment.

Equity



Everyone gets the supports they need (this is the concept of "affirmative action"), thus producing equity.

Justice

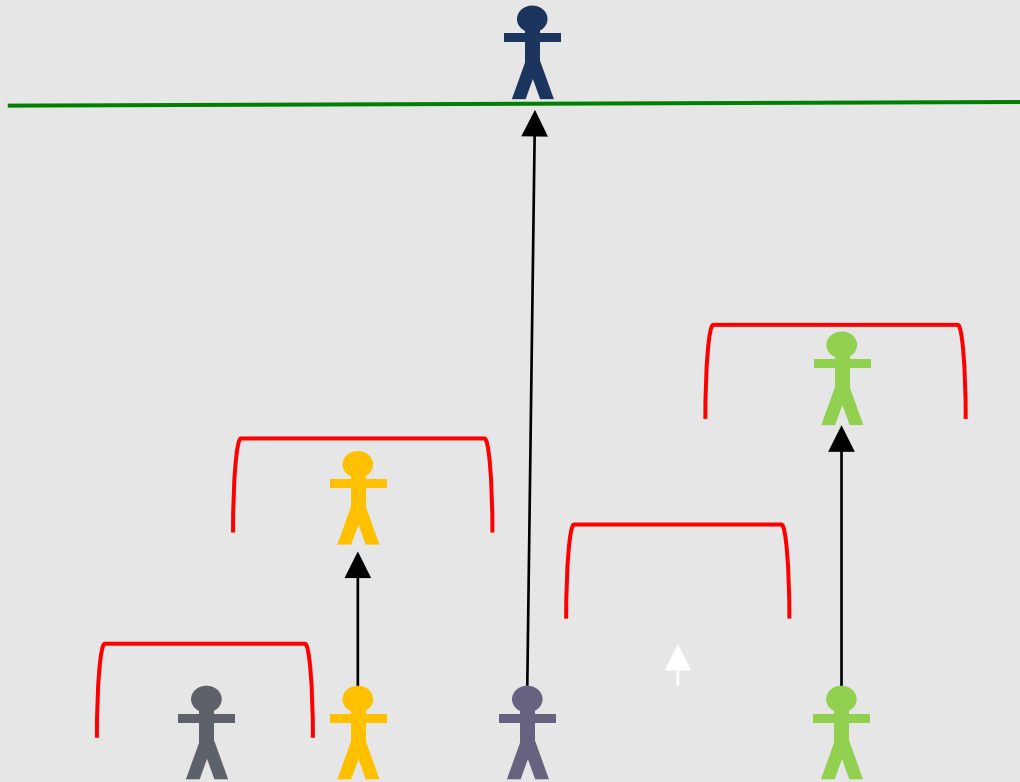


All 3 can see the game without supports or accommodations because **the cause(s) of the inequity was addressed**. The systemic barrier has been removed.

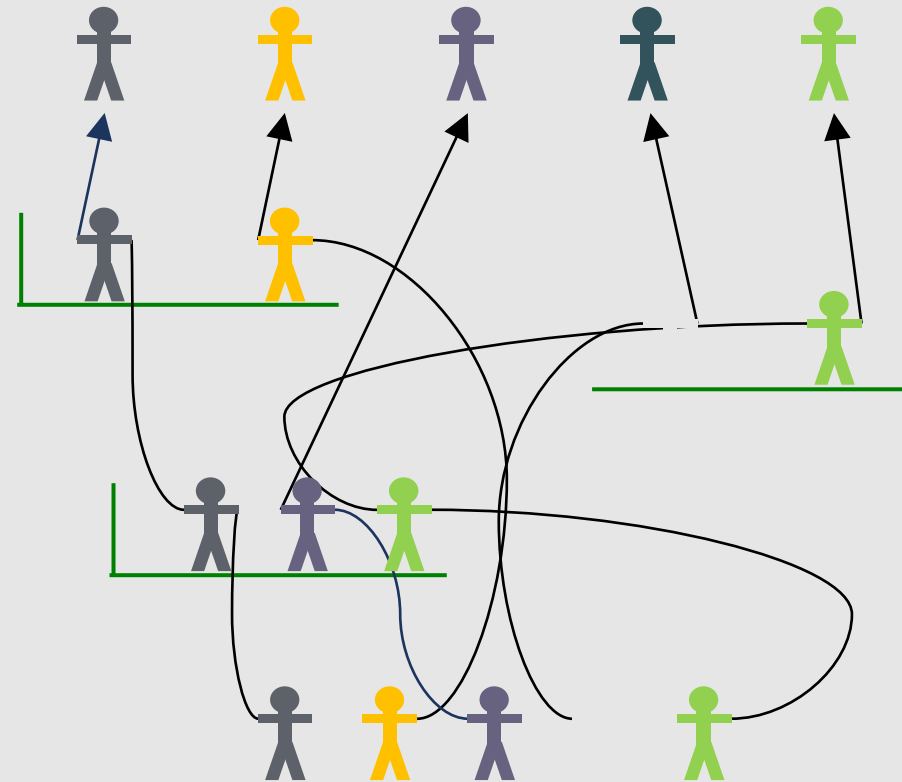


GUIDING FRAME: TARGETED UNIVERSALISM

Structural inequity produces consistently different outcomes for individuals from different communities



Targeted universalism means setting universal goals for everyone and developing targeted solutions for different communities





TOOLS FOR CHALLENGING DISCUSSIONS

Listening

What to listen for?

- Rationales being expressed
- The needs/values behind what is being said; and how important these are
- Embedded assumptions or perspectives (but do not judge)
- Common goals
- Proposals for action

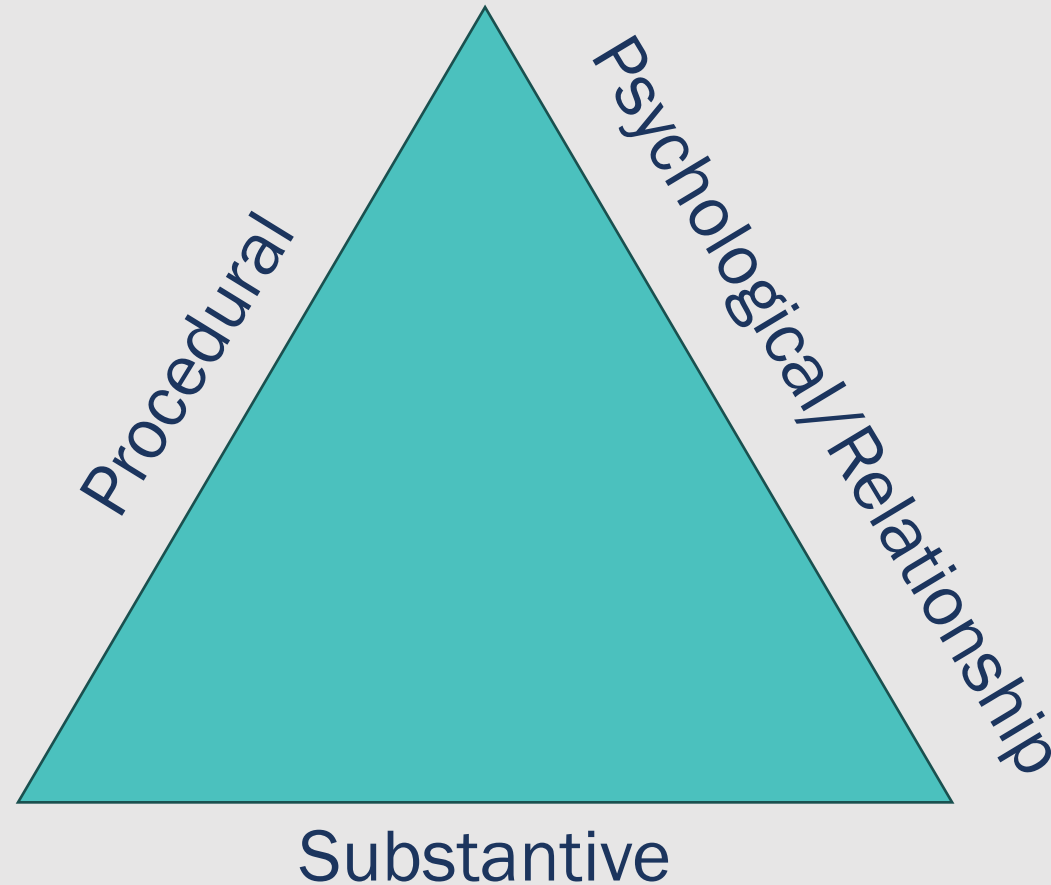


TOOLS FOR CHALLENGING DISCUSSIONS

Inquiry

- »Allows another person to be heard
- »Test assumptions (provide reality check)
- »Gather information
- »Discover interests and issues
- »Generate and explore possible options
- »Help someone think through their choices

THE IMPORTANCE OF RELATIONSHIPS & COMMUNICATION





REMEMBER

- We are drafting new rules, using a new process
- We are trail blazers - this work hasn't been done in this way before
- We are trying to develop an approach that works across the state, meets multiple interests, address concerns



REFLECTION & LARGE GROUP DISCUSSION

- When have you had a positive experience navigating complex decisions in your work/life? What helped make it a success?
- How can those lessons learned or the tools we just discussed help us navigate the challenges we identified earlier?





BREAK

5 Minutes

Returning at 11:10 am

REGULATIONS, POLICIES, EXISTING PRACTICES, AND CHALLENGES



SUPPORTIVE DOCUMENTS

- Research on existing toll regulations, rules and policies
- Existing practices:
 - Discounts (low income) and exemptions
 - Toll rate setting and adjustments
 - Comparison chart, includes vehicle classifications

Oregon Department of Transportation

Research on Regulations & Policy:
 Low-Income Toll Program and Equity, Toll Rate Setting and Adjustments, Discounts, Exemptions, and Rates by Vehicle Type

STRAC & EMAC July 21 Joint Workshop Materials
 Date Updated: June 29, 2023

The purpose of this document is to provide information on the existing regulations, policies, and rules that govern topics of low-income tolls, rate setting and adjustments, discounts, exemptions, and rates by vehicle types. This is meant to inform the development of statewide rules (OARs) for Oregon.

Oregon Department of Transportation

Existing Practices:
 Low-Income Toll Program, Discounts, and Exemptions

STRAC September Meeting Materials
 Date Updated: July 14, 2023

The purpose of this document is to provide information on existing discounts, exemptions, and low-income toll programs. This will inform the development of statewide rules (OARs) and Oregon's Low-Income Toll Program. These existing practices are divided into longer, corridor-length toll programs and bridge toll projects.

Oregon Department of Transportation

Existing Practices:
 Toll Rate Setting and Adjustments

STRAC & EMAC July 21 Joint Workshop Materials
 Date Updated: July 14, 2023

The purpose of this document is to provide information on how other states have addressed the process for setting and adjusting toll rates in regulations, policy, and rules. This is meant to inform the development of statewide rules (OARs) that inform rate setting and adjustments in Oregon.

The document is divided into sections that highlight two state and two regional-level tolling programs toll rate setting and adjustment framework with notes from staff-to interviews.

Toll Rate Setting and Adjustments
 Regulations, policies, and rules that guide toll rate setting and adjustments are specific to each state or region. Not all states use statewide rules, but from our research on

Existing Practices

D = Discount
 E = Exemption
 O = Other, see explanation

State	Toll Operator	Location	Facility	Types of Vehicles	
				Motorcycle	High Occupancy Vehicles (HOV)
Oregon	Port of Hood River	Hood River	Hood River-White Salmon Bridge	-	-
Washington	WSDOT	Seattle region	Various bridge, tunnel and managed lanes	-	-
California	Bay Area Toll Authority	San Francisco Area	Various bridges and express lanes	E	D / E
California	Los Angeles MTA ("LA Metro")	Los Angeles	Express Lanes	-	D
Illinois	Illinois State Toll Highway Authority	Northern Illinois	Various interstate and regional expressways	-	-
Colorado	Denver E-470 Public Highway Authority	Denver area	E-470	-	-
Colorado	Colorado DOT and others	Denver area	Various managed lanes	E / O	E / O
Florida	Florida's Turnpike Enterprise	Statewide	Various expressways and express lanes	-	-
Virginia	I-66 Express Mobility Partners	Northern VA	I-66	E	E
Virginia	Elizabeth River Crossings	Hampton Roads	Elizabeth River Tunnels	-	-
Minnesota	MnDOT	St. Paul/Minneapolis	Express Lanes	E	E

Other
 Colorado DOT's approach on I-70 (road between Denver and the mountains) does not include HOV or motorcycle exemptions.

Go to meeting materials for documents

NEW ORGANIZATION OF OREGON ADMINISTRATIVE RULES (OARs)

- Applies statewide (references bi-state agreements)
- Steps: toll project application, rate setting, and adjustments
- Enrollment and compliance
- Vehicle types and customers

New Organization of Toll State Rules – Oregon Administrative Rules (OARs)

Highlighted = Reviewed by STRAC, as of May 2023

731-040-0010 Purpose

731-040-0020 Definitions

731-040-0030 Fees for government or private entity toll project applications

731-040-0040 Review process for toll projects submitted by government or private applicants

731-040-0041 Review process for toll projects on Interstate Bridges

731-040-0050 Process for reviewing and approving the establishment of tolling and toll rates; generally

731-040-0051 Process for reviewing and approving the establishment of tolling and toll rates; Interstate Bridges

731-040-0060 Process for approving revised toll rates, generally

731-040-0061 Process for approving revised toll rates, Interstate Bridges

731-040-0070 Toll accounts and payment

731-040-0071 Administrative fees

731-040-0072 Payment process

731-040-0073 Civil Penalty process

731-040-0074 Dispute process

731-040-0075 Customer data

731-040-0080 Exempt vehicles

731-040-0081 Discounts

731-040-0082 Tribal government vehicles and members

731-040-0083 Vehicle types

731-040-0090 Toll rate schedules and suspension of tolls

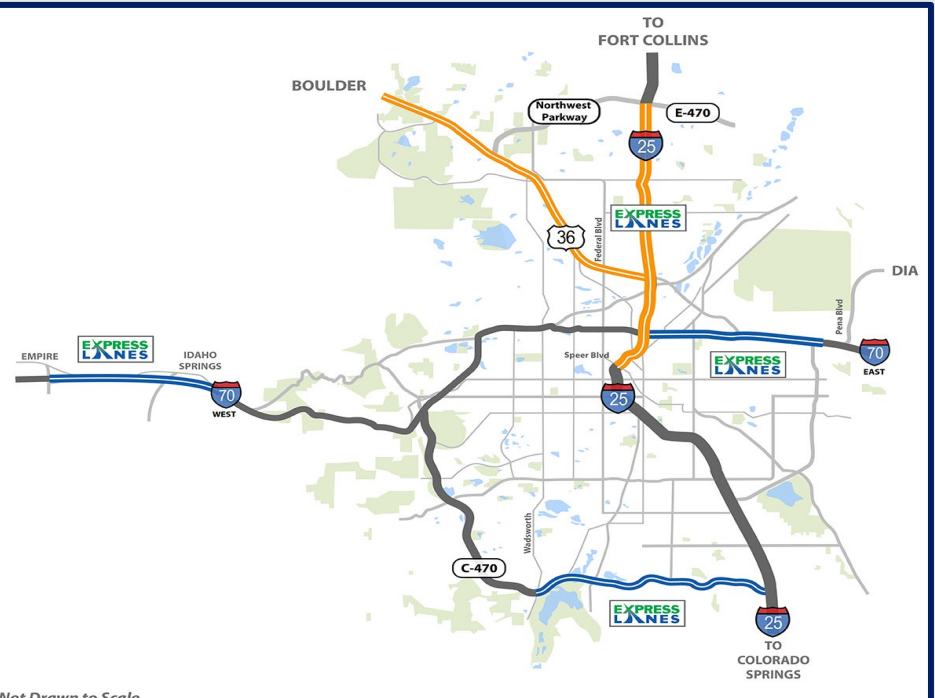
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KEY MESSAGES ABOUT ADMINISTRATION

- Reliable revenue stream needed for bond financing
- Scalability and flexibility will be needed with experience
 - Ongoing efforts to simplify customer requirements
 - To offer new customer services
 - To minimize operating costs – and to support financing
- Need to consider combined impacts of tolls and the weight-mile tax in determination of commercial vehicle class tolls



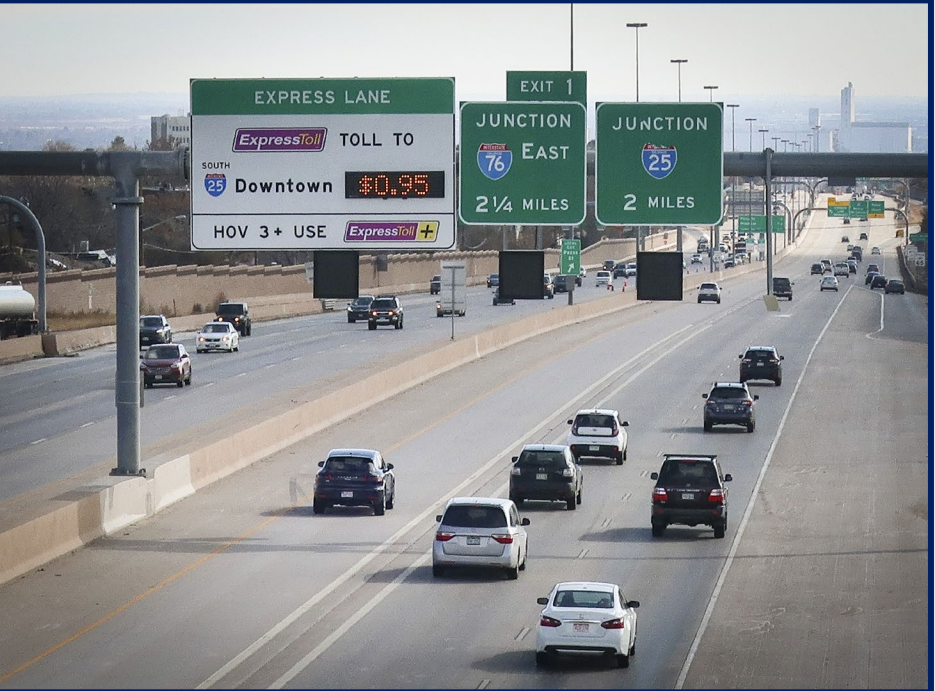
How have others addressed toll discounts, exemptions, and lower-income customers?



Not Drawn to Scale

DENVER

- Dynamic pricing (rates change with traffic) on express lanes
- Motorcycles, transit, and high-occupancy vehicles (3+ people) travel for free (not on I-70)
- NEW: Only for E-470 and residents of Globeville and Elyria-Swansea displaced by project
 - \$100 toll credit and 10 free transit passes
 - Income at 200% federal poverty level
 - 5,600 residents are eligible for the program, about half of these communities

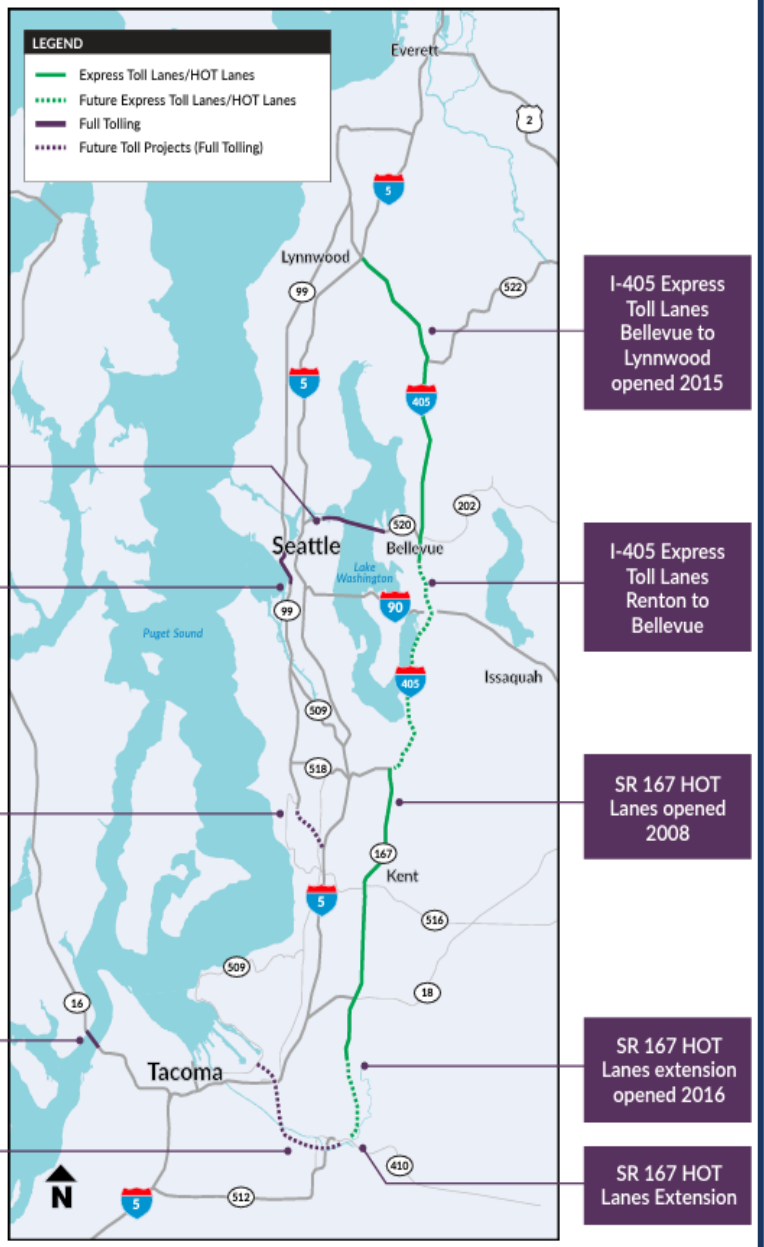


ILLINOIS TOLLWAY (NORTHEAST ILLINOIS)

- Toll rates same on all lanes and all times, except for toll discounts:
 - Electronic toll “I-PASS” 50% discount
 - Commercial vehicles for overnight hours discount
- NEW: Assist program
 - Income below 250% of the Federal Poverty Level
 - Lower amount required to open an account (\$4 + no deposit)
 - Eligible to have invoice fees dismissed



TOLL FACILITIES



SEATTLE

- Variable rate tolls (express lanes and all lanes for bridges and tunnels)
- Emergency response, transit, vanpools travel for free (not carpools)

SAN FRANCISCO BAY AREA

- Variable rate tolls (all lanes and express lanes)
- Discounts for carpools, vanpools, motorcycles and eligible clean air vehicles
- NEW: For the Golden Gate Bridge lower-income residents can receive a COVID waiver for any penalties
- NEW: One-time \$100 toll credit and \$100 annual transit credit for San Mateo 101 Express Lanes (resident of San Mateo County and income \$78,300 or below)



HAMPTON ROADS, VIRGINIA

- Variable toll rate schedule on all lanes
- 50% discount for Hampton Roads residents earning \$50,000 or less
- Registered user, passenger vehicle, and annual certification
- Approximately 2,500 enrolled
- Average benefit of \$25/month





How have others addressed toll rate setting and adjustments?

TAKEAWAYS

- Types of toll operators
 - Independent public agencies (Illinois Tollway, North Texas Turnpike Authority)
 - Department of Transportation (Colorado, Washington, Virginia)
- Types of performance measures
 - Revenue collection reliability and efficiency
 - Traffic performance (speed, travel times)
- Working closely with local governments on process, but not direct revenue sharing



Existing Practices: Toll Rate Setting and Adjustments

STRAC & EMAC July 21 Joint Workshop Materials

Date Updated: July 14, 2023

The purpose of this document is to provide information on how other states have addressed the process for setting and adjusting toll rates in regulations, policy, and rules. This is meant to inform the development of statewide rules (OARs) that inform toll rate setting and adjustments in Oregon.

The document is divided into sections that highlight two state and two regional-level tolling programs toll rate setting and adjustment framework with notes from staff-to-staff interviews.

Toll Rate Setting and Adjustments

Regulations, policies, and rules that guide toll rate setting and adjustments are specific to each state or region. Not all states use statewide rules, but from our research of

Go to meeting materials for document

A worker in a red safety suit and hard hat stands on a blue scissor lift, working on a steel bridge structure. The background is a dense forest of evergreen trees. The scene is dimly lit, suggesting dusk or dawn.

How do others classify and charge trucks (freight)?

TAKEAWAYS

- Classification by axle count
 - Traditional measure of relative size for tolls
 - An expensive carry-over from cash toll days
- Classification by shape
 - Another way to measure relative size
 - Faster and cheaper to install than axle-counters
- Wide range of potential classifications and rate increments
- Rate increments determined during the toll rate setting process

Classifications

State	Toll Operator	City	Facility	Number of Categories	Weight, or Shape
Oregon	Port of Hood River	Hood River	Hood River-White Salmon Bridge	11	Axle
Washington	WSDOT	Seattle region	Various bridge, tunnel and managed lanes	6	Axle
California	Bay Area Toll Authority	San Francisco Area	Various bridges and express lanes	6 on the bridges	Axle on bridge
California	Los Angeles MTA ("LA Metro")	Los Angeles	Express Lanes	-	Axle
Illinois	Illinois State Toll Highway Authority	Northern Illinois	Various Interstate and regional expressways	4	Axle
Colorado	Denver E-470 Public Highway Authority	Denver area	E-470	3	Axle
Colorado	Colorado DOT and others	Denver area	Various managed lanes	3	Axle
Florida	Florida's Turnpike Enterprise	Statewide	Various expressways and express lanes	6	Axle
Virginia	I-66 Express Mobility Partners	Northern VA	I-66	9	Shape
Virginia	Elizabeth River Crossings	Hampton Roads	Elizabeth River Tunnels	2	Axle
Minnesota	MnDOT	St. Paul/Minneapolis	Express Lanes	-	-
Texas	TXDOT	Dallas	LBJ TEXpress Lanes, NTE TEXpress Lanes and NTE 35W TEXpress Lanes	7	Shape



Go to meeting materials for document

BE THINKING ABOUT

- Of the existing practices that we discussed, what do you think would work best for Oregon?

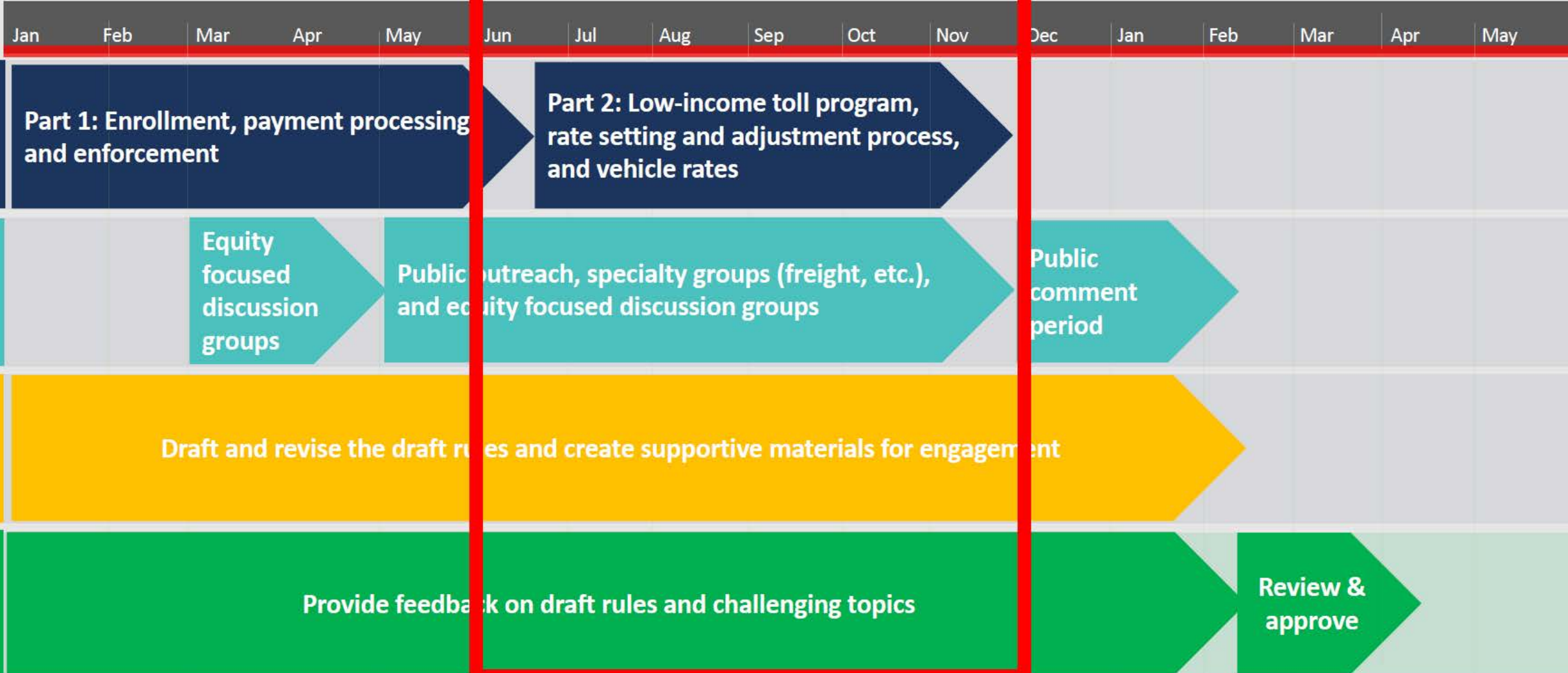
LOOKING AHEAD & NEXT STEPS

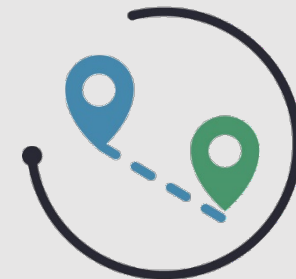


TIMELINE: TOLL RULES UPDATE (OARs)

2023

2024



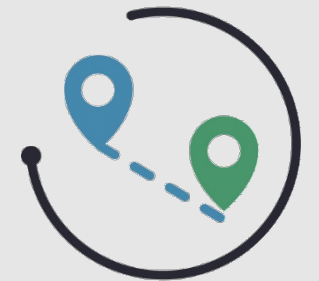


LOOKING AHEAD

- Level 2: Low-income toll program, discounts, and exemptions (September 22)
- Level 2: Toll rate setting/adjustments process and rate framework for vehicles by type (October 27)
- Level 3: Finalize feedback on draft rules and committee fiscal and equity statement (November 17)

SUPPORTIVE INFORMATION WE ARE PLANNING TO PREPARE

- Highway Cost Allocation Study and toll interaction memo
- Information to support the low-income program development:
 - Traffic and revenue analysis on different options for 200% and 400% FPL
 - Process flows for enrollment and verification
 - Self-certification research
 - Administration analysis of options
- Analysis of impacts for exemptions and discounts (administration, traffic, revenue, equity, etc.)



EMAC & STRAC COORDINATION

COMMUNITY ENGAGEMENT



OREGON TRANSPORTATION COMMISSION AND ADVISORY COMMITTEES



EQUITY AND MOBILITY ADVISORY COMMITTEE (EMAC)

- Next Meeting:
August

OREGON TRANSPORTATION COMMISSION (OTC)

- Next Meeting:
September 14

REGIONAL TOLL ADVISORY COMMITTEE (RTAC)

- Next Meeting:
September 18

EQUITY & MOBILITY ADVISORY COMMITTEE (EMAC): REPORT OUT

- ODOT-EMAC Accountability Workshop (July 10)
 - Deepened EMAC's understanding of how ODOT is advancing equity and discussed how to balance competing priorities
- EMAC Meeting (August)
 - Review proposed changes to the Equity Framework to add language that includes Tribal nations
 - Review Regional Mobility Pricing Project options and provide input on equity performance criteria
 - Equity selection criteria for nexus and Public Transportation Strategy projects

REGIONAL TOLL ADVISORY COMMITTEE (RTAC): REPORT OUT

- Meeting 8 (June 26)
 - Discussed opportunities to advance equity with tolling
 - Discussed draft criteria for projects with a nexus to tolling
- Next meeting in September

TRIBAL GOVERNMENT-TO-GOVERNMENT CONSULTATION: REPORT OUT

- Met with Siletz, Umatilla, and Grand Ronde
- Draft rules language for Tribal government vehicles and members sent for review and input

RECENT AND UPCOMING ENGAGEMENT OPPORTUNITIES



Recent

- Oregon Transportation Commission Meeting
- Motor Carrier Transportation Advisory Committee Meeting

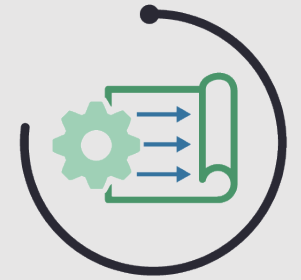
Upcoming Discussion Groups

- July/August Community Engagement Liaison Discussion Groups

Tabling Events

- July 21 (tonight!) - City of Wood Village City Nite Out
- July 23 – Lents International Farmer's Market
- July 27 – Portland Last Thursday with the Black United Fund of Oregon
- July 30 – Montavilla Street Fair
- August 9 – Willamette Wednesday Market

★ Visit www.oregon.gov/odot/tolling/pages/calendar.aspx to find a tabling event near you!



NEXT STEPS

- Evaluations to be sent after today's meeting
- No STRAC meeting in August
- Next STRAC meeting scheduled for September 22, 2023, 9:00am – 12:00pm

A worker in a blue safety suit and hard hat is positioned on a blue lift bucket, working on a steel bridge structure. The background is a dense forest of evergreen trees. The scene is dimly lit, suggesting dusk or dawn.

THANK YOU