

STATEWIDE TOLL RULEMAKING ADVISORY COMMITTEE (STRAC)

Meeting #7

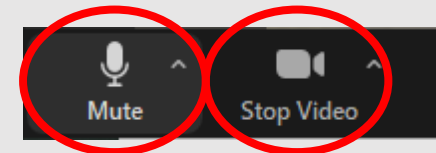
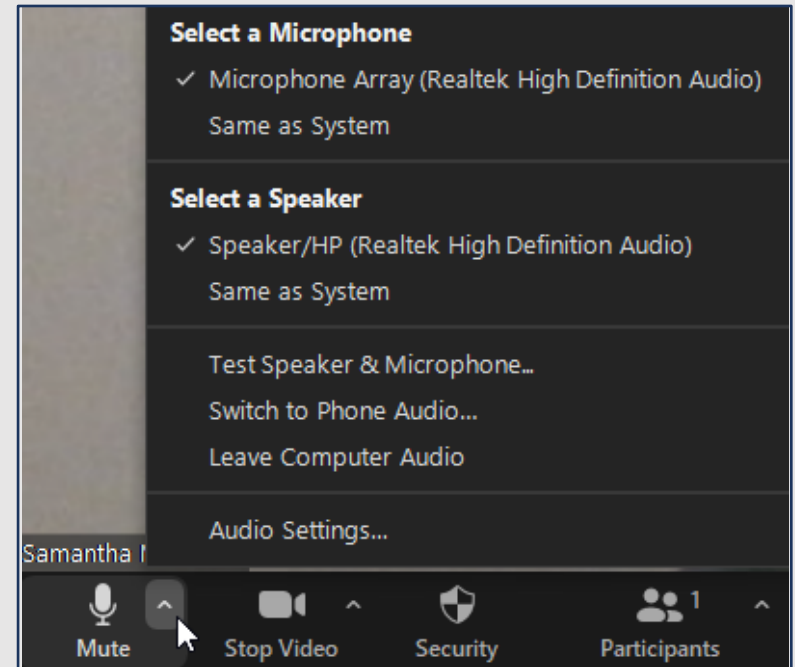
September 22, 2023

1

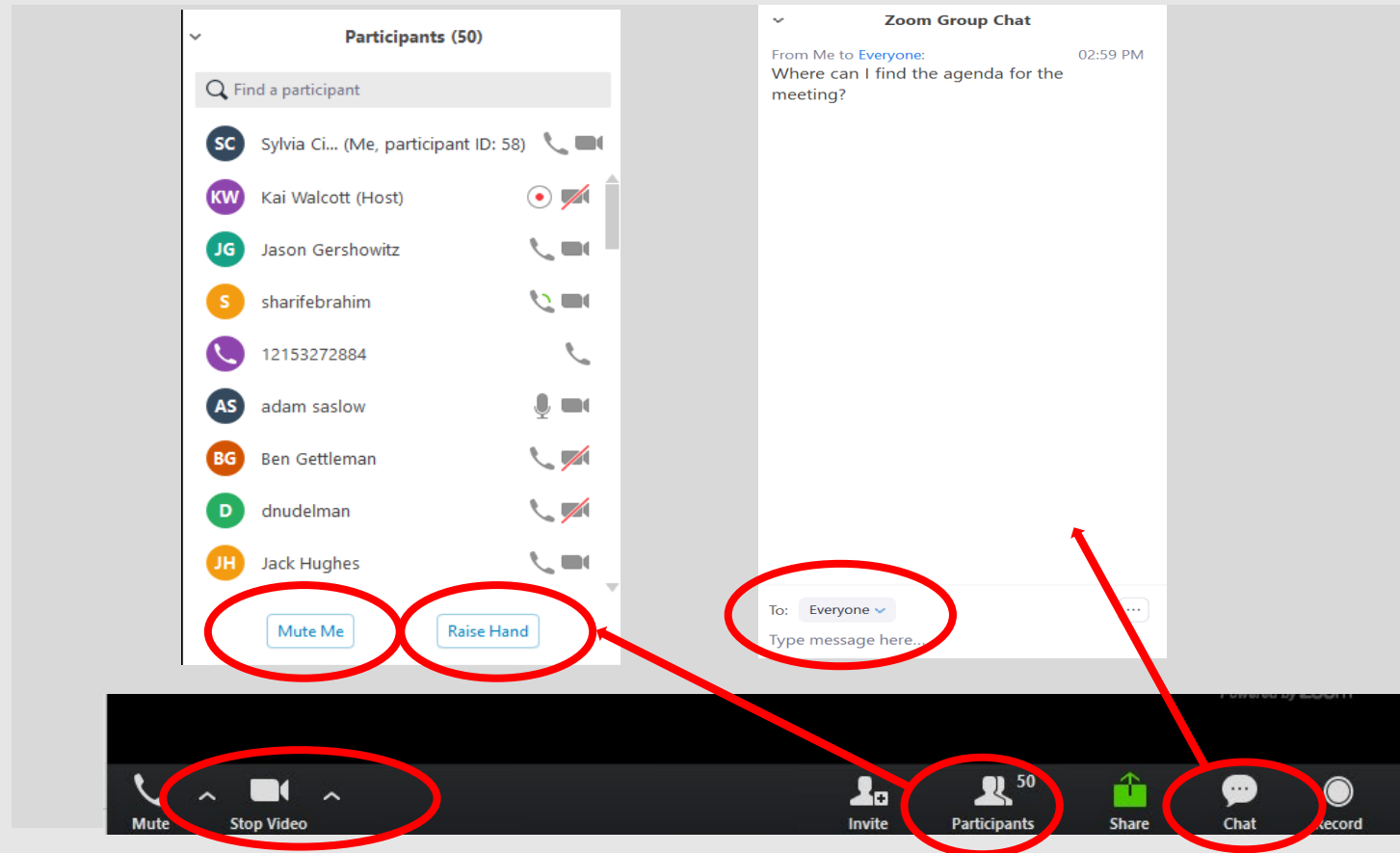
ZOOM MEETING TIPS FOR STRAC MEMBERS

- 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.



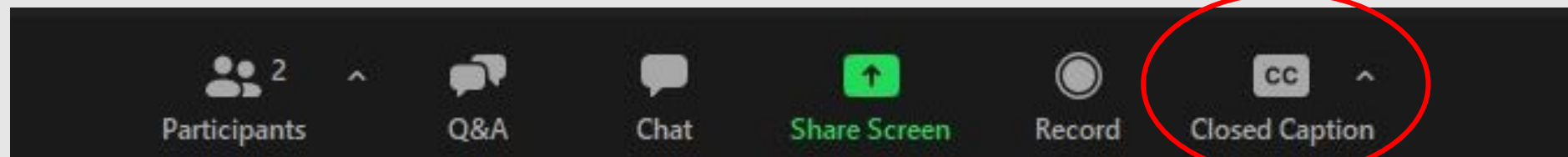
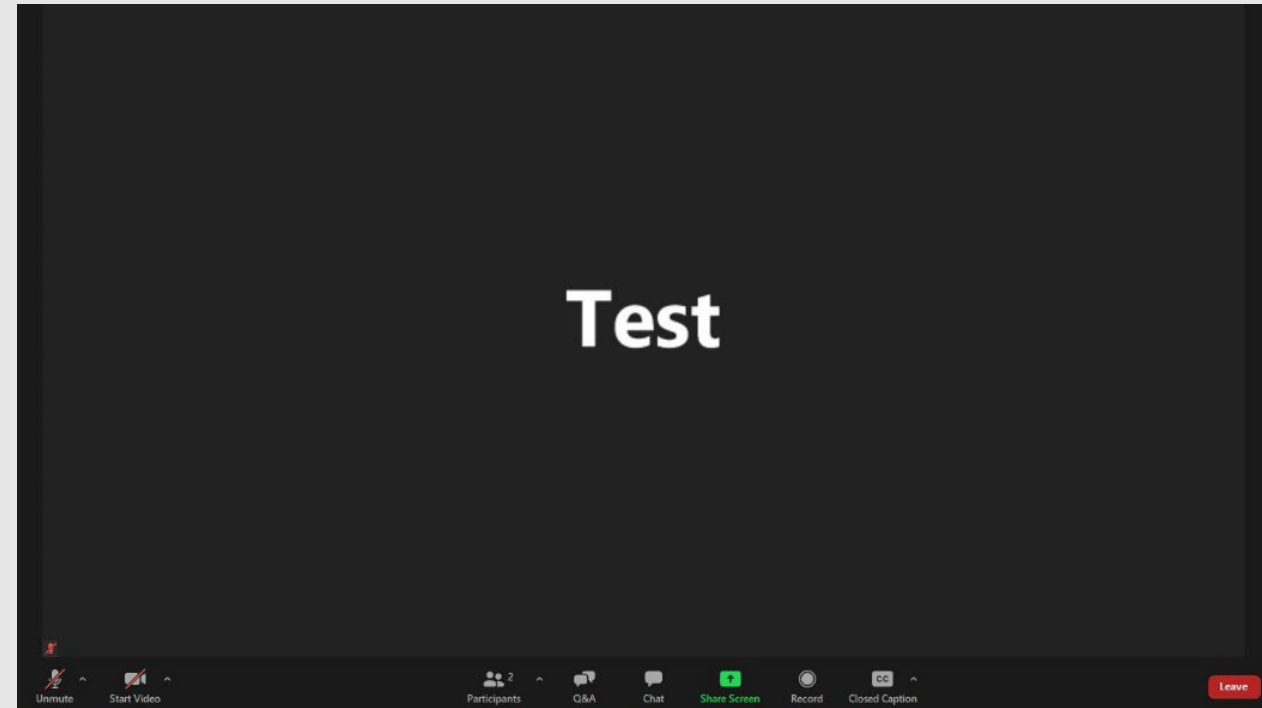
ZOOM MEETING TIPS FOR STRAC MEMBERS



- 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.



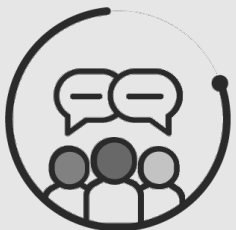
HOW TO COMMENT



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
- **9:10 am:** Welcome
- **9:25 am:** Where We've Been and Where We're Going
- **9:30 am:** What We've Heard
- **9:50 am:** Discounts and Exemptions
- **10:50 – 10:55 am:** Break
- **10:55 am:** Low-Income Discount Program – Rules and Enrollment
- **11:45 am:** Looking Ahead and Next Steps
- **11:55 am:** Next Steps and Thank You
- **12:00 pm:** Adjourn

INTRODUCTION

STRAC Member	Organization
Elizabeth Mazzara Myers	Westside Economic Alliance
Ethan Hasenstein	Knife River Corporation
Jeff Spiegel	Penske Truck Leasing
Lanny Gower	XPO Logistics
Lauren Poor	Oregon Farm Bureau
Marc Ortega Kilman-Burman	Global Medical Response (GMR)
Marie Dodds	AAA Oregon/Idaho
Michael Card	Combined Transport Inc.
Nafisa Fai	Washington County Commission Liaison from Region Toll Advisory Committee
Omar Cruz	May Trucking
Park Woodworth	Ride Connection
Philip Wu	Oregon Environmental Council and public health Liaison from Equity and Mobility Advisory Committee
Sean Philbrook	Identity Clark County
Shannen Knight	A Sight for Sport Eyes
Sharla Moffett	Oregon Business and Industry
Shatrine Krake	West Linn Chamber

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

- Understand the current stage of the committee's work in the rulemaking process.
- Hear about the latest community input on rulemaking topics.
- Build upon the last meeting to inform feedback on draft rules relating to the Low-Income Toll Program and exemptions.
- Understand the role and status of the other toll advisory committees.

TRIVIA

In the 16th and 17th Centuries, local governments accepted money and what other form of payment for use of their tolled roads on an annual basis?

- A. 2 goats or 1 horse
- B. 1 bundle of turnips and 3 heads of cabbage
- C. 6 days of labor building the road
- D. 16 flagons of ale

TRIVIA



Tyburn Turnpike (1820)
from *Old and New London* by E Walford (1878)

C. 6 days of labor building the road

In the 16th and 17th Centuries, local governments financed road improvements through property taxes and up to six days of labor per year from their residents to finance road work.

WELCOME

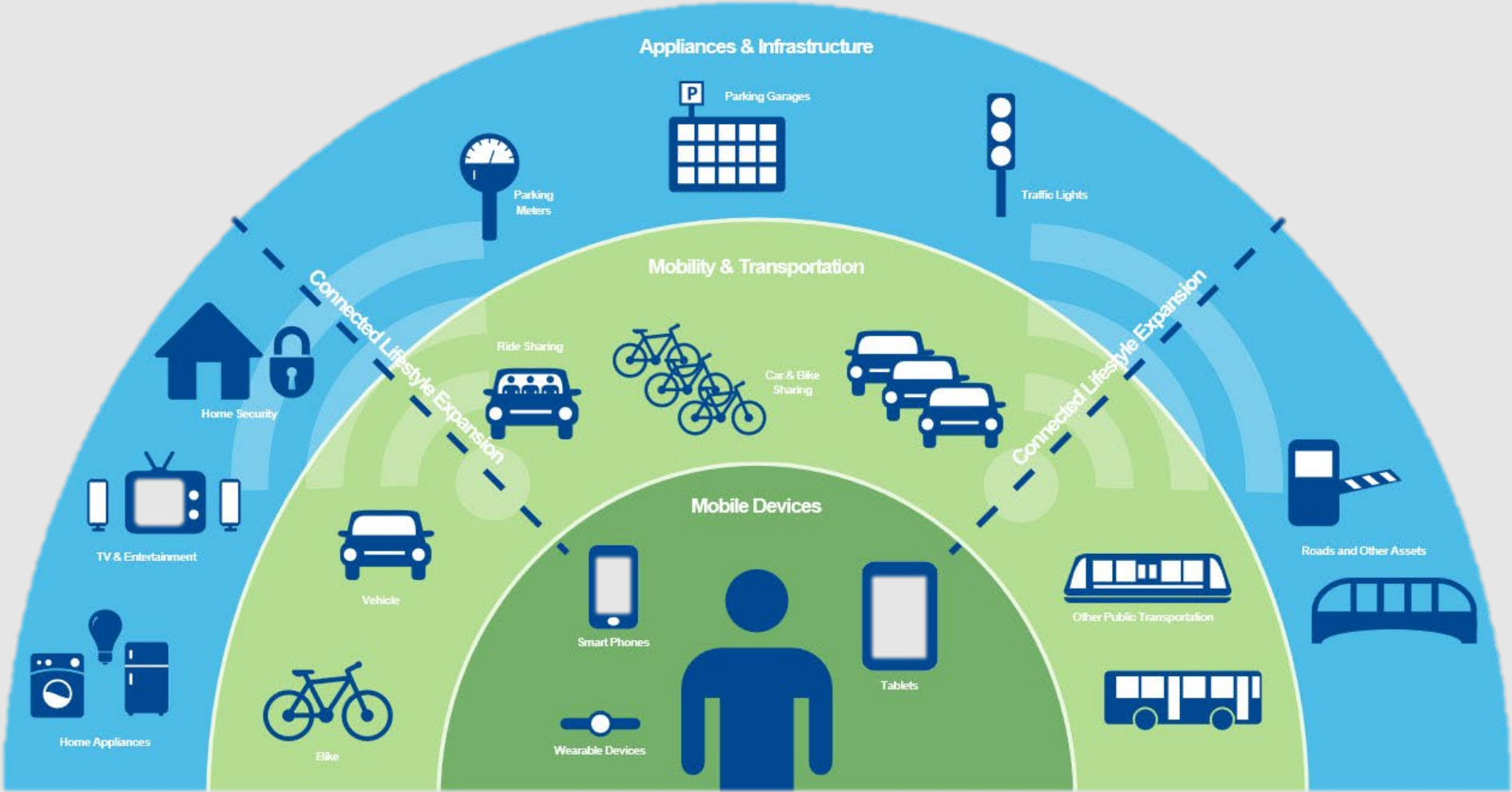


Travis Brouwer

Assistant Director of Revenue, Finance, and
Compliance

Oregon Department of Transportation

MODERN, CONNECTED TRANSPORTATION SYSTEM



OTC REPORT OUT: LOW-INCOME TOLL PROGRAM DECISIONS BY THE END OF 2023

- Commit to program for up to 200% of federal poverty level and identify the benefit level, with further analysis to confirm/refine
- Analyze options for a 200-400% of federal poverty level program to analyze in greater depth to allow the Oregon Transportation Commission to make a decision in 2025
- Identify the geographic extent of the program

Q&A

WHERE WE'VE BEEN & WHERE WE'RE GOING



TIMELINE: TOLL RULES UPDATE (OARs)

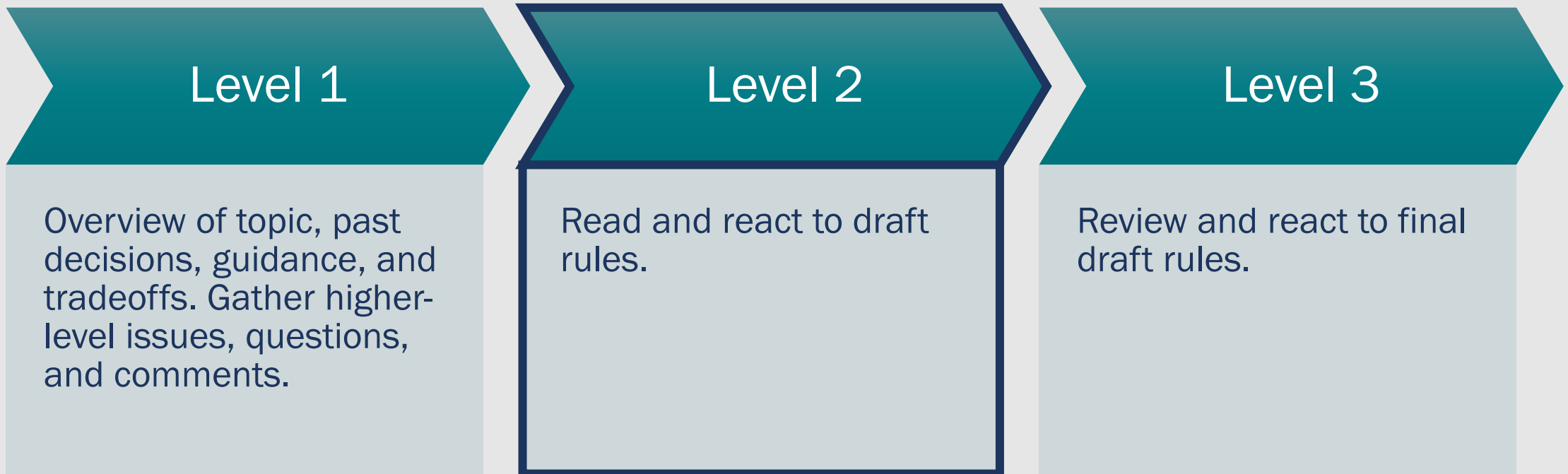


2023

2024



STRAC & ODOT ENGAGEMENT PROCESS



WHAT WE'VE HEARD



Community Engagement Report Out: July - August 2023

Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
Date Updated: September 15, 2023

ODOT is continuing conversations across greater Portland to build a toll program that works for communities. In July and August, ODOT held eight discussion groups in partnership with the Community Engagement Liaison (CEL) program. CELs facilitated conversations with Vietnamese, Chinese, Latinx, Black and African, Black, Indigenous, People of Color, Slavic, people living with disabilities, and Tribal or Native American community members.

Community Engagement Liaisons are active community leaders who provide interpretation, translation, and engagement services for toll projects. ODOT has held **41** discussion groups with liaisons since the start of the Oregon Toll Program.

We talked with community members about plans for toll accounts, payment options and process, data privacy, and discounts and exemptions. Participants then shared ideas about how to make it easy to sign-up for an account, update information, and pay bills on time.

What We Heard

Pre-paid toll accounts: We shared that if you signed up for a toll account and put money in your account, you would get the best deal. We asked participants if this is something they would consider doing.

- Interest in signing up for pre-paid toll accounts to save money and avoid surprises.





SUMMER ENGAGEMENT OVERVIEW



- Over 20 events this summer with more heading into the fall
- Engaged with over 3,600 people
- In-language staff support for multicultural events
- 8 meetings with Community Engagement Liaisons
- 2 Community-Based Organization discussion groups
- 13 interviews with Community-Based Organizations on travel trends and engagement preferences



COMMUNITY ENGAGEMENT ACTIVITIES

- Community Engagement Liaisons (CELs)
Discussion Groups
- Community-Based Organizations
Discussion Groups
- Freight Webinar
- Workforce Briefing





COMMUNITY ENGAGEMENT LIAISON (CEL) DISCUSSION GROUPS - OVERVIEW

- 8 virtual meetings with Vietnamese, Chinese, Latinx, Black and African, BIPOC, Slavic, Tribal and Native American, and people living with disabilities community members about toll accounts, payments, and discounts and exemptions





CEL DISCUSSION GROUP KEY THEMES

- Preference for post-paying with automatic payments
- Concerns for middle-class families
- Concerns from people living with disabilities
- Concerns about information security
- Discount eligibility
- Use of proof of enrollment in existing programs to qualify for discounts.
- Make it easy and accessible to sign up and pay tolls

Our roads need work to make them safer for travel.

As more people live and work in the Portland area, the roads will get more crowded – and they'll need continued maintenance, too.

Urban Mobility STRATEGY www.OregonTolling.org

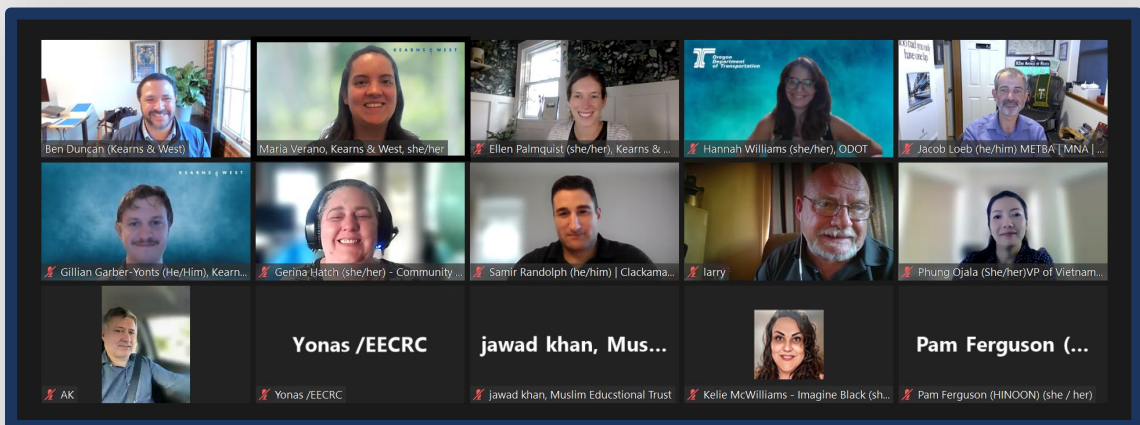
COMMUNITY-BASED ORGANIZATION DISCUSSION GROUP – OVERVIEW

- September 19
Discussion Group
- 10 Participating CBOs
- Discussion Topic:
 - The Low-Income Toll Program
 - How to help people sign up for the program
 - Preferred type of discount,
 - How to show income verification





COMMUNITY-BASED ORGANIZATION DISCUSSION GROUP – KEY THEMES



- Flexibility in benefits
- Regionally disproportionate impact
- Impacts for travelers who depend on the system for their livelihood
- Discounts for people providing services
- CBO involvement in the toll program
- More information on the Low-Income Toll Program
- Suggestions for the income verification and application process

WORKFORCE DEBRIEF - OVERVIEW

- Interest in revenue generation
- Partnerships for engagement and income verification
- Contracting opportunities for CBOs
- Connections with Equity Framework Communities
- Strategic regional approach



DISCOUNTS & EXEMPTIONS



Discounts and Exemptions: Commitments and Feedback

Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
Date Updated: September 15, 2023

The purpose of this document is to build from the following documents that detailed Oregon's regulations, rules and policies, as well as the existing toll industry practices around discounts and exemptions - that we discussed at the July 2023 STRAC meeting - to provide feedback on the list of requests that ODOT has received.

Key message

For every tolling discount or exemption granted, we must ensure we can properly operate the system and collect revenue. New ways that are transparent, accessible, account for quality customer service experience. This adds cost. Those costs will result in higher tolls for those who do not benefit from the discount or exemption collected for congestion management investments.

By providing an economic break for certain categories of vehicles, we are managing demand and its impact on congestion to meet crucial emission reduction goals.

From an equity perspective, we are striving to ensure that any discount or exemption granted, although intended to benefit a specific community, will add to the complexity of the system.

It is with this understanding that we take rigorous steps to ensure that any discount or exemption granted, so that we can ensure that it fulfills our goals.

Exemption

- Higher
- Higher



Draft Toll Rules

Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
Date Updated: September 15, 2023

Blue highlighted = state law

TOLL DISCOUNTS AND EXEMPTIONS

731-040-0080 Exempt Vehicles

- (1) Except as provided herein, all vehicles using a toll facility must pay the required toll. Only qualified vehicles may be exempted from paying tolls.
- (2) An exempted vehicle should connect directly to the needs for operation, maintenance, safety, and/or person-carrying capacity of the tolled roadway or for emergency response. Exempted vehicle types will be reviewed annually as a part of the toll rate monitoring and adjustment process, as is identified in OAR 731-040-0060 and 731-040-0061.
- (3) The registered owner and operator of the qualified vehicle must comply with the requirements of the Department to obtain the exemption.
- (4) To receive the exemption, the eligible vehicle must be connected to a registered toll account with the Department.
- (5) Eligibility status would be verified through one of the following:
 - a. Vehicle registration or classification information already held by the Department; or
 - b. Information as deemed acceptable by the Department that identifies the vehicle or registered vehicle owner as qualified.
- (6) There is a limit of three (3) vehicles that can be associated with an exempt individual member account.



DISCUSSION ROAD MAP

1. Clarifying questions about the exemptions analysis and proposal
2. Temperature check: Is ODOT on the right track for proposed exemptions?
3. Draft rules review



RECAP: JULY MEETING'S LEVEL 1 REVIEW - DISCOUNTS AND EXEMPTIONS



- Varied opinions on how much different types of drivers should pay
- Questions around different rates based on vehicle class or size
- Request to offer discounts or special accommodations for different license types (farm vehicles and disabled veterans)
- Desire to see bi-state freight concerns addressed



EXEMPTIONS: KEY MESSAGE

Impact to the system

- Higher tolls
- Higher administration cost
- Less revenue
- More complex to communicate
- Impact to emissions reduction



FACTORS INFORMING EVALUATION

Revenue

Congestion

Climate

Equity

Administration

Policy



PROPOSED EXEMPTIONS

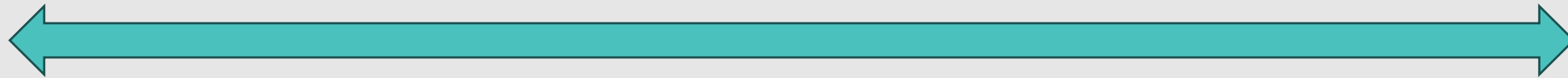
- Public transit (required by law)
- Military personnel (required by law)
- Emergency response vehicles, such as police, fire, ambulance, etc.
- Highway safety response vehicles
- Tribal government vehicles and vehicles registered to an enrolled member



Clarifying Questions?



"I think ODOT is headed in the right direction with the proposed approach to exemptions."



No, cannot support (0)

Will barely go along (1)

Don't like it all, but will go along (2)

Like some, not all (3)

This is fine (4)

Yes, fully support (5)

DRAFT RULES: EXEMPTIONS



Draft Toll Rules

Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
Date Updated: September 15, 2023

Blue highlighted = state law

TOLL DISCOUNTS AND EXEMPTIONS

731-040-0080
Exempt Vehicles

- (1) Except as provided herein, all vehicles using a toll facility must pay the required toll. Only qualified vehicles may be exempted from paying tolls.
- (2) An exempted vehicle should connect directly to the needs for operation, maintenance, safety, and/or person-carrying capacity of the tolled roadway or for emergency response. Exempted vehicle types will be reviewed annual as a part of the toll rate monitoring and adjustment process, as is identified in OAR 731-040-0060 and 731-040-0061.
- (3) The registered owner and operator of the qualified vehicle must comply with the requirements of the Department to obtain the exemption.
- (4) To receive the exemption, the eligible vehicle must be connected to a registered toll account with the Department.
- (5) Eligibility status would be verified through one of the following:
 - a. Vehicle registration or classification information already held by the Department; or
 - b. Information as deemed acceptable by the Department that identifies the vehicle or registered vehicle owner as qualified.
- (6) There is a limit of three (3) vehicles that can be associated with an exempt individual member account.

Helpful feedback:

- Clarification questions
- Suggested edits for words
- Identifying areas that we missed



BREAK

5 Minutes

Returning at 10:25 am

LOW-INCOME DISCOUNT PROGRAM – RULES


Oregon
 Tina Kotek, Governor

Oregon Transportation Commission
 Office of the Director, MS 11
 355 Capitol St NE
 Salem, OR 97301-3871


DATE: August 31, 2023
TO: Oregon Transportation Commission
FROM: 
 Kristopher W. Starnes
 Director
SUBJECT: Agenda Item J-

Requested Action:
 Receive an update on ODOT's work to the low-income toll program.

Background:
 ODOT continues to make progress on the Regional Toll Advisory Committee and Equity and Mobility. After completing review, STRAC has begun work on a framework—including exemptions—are available. ODOT released the procedure for service center functions and other related equipment. ODOT has continued coordination with government vehicles and other agencies.

Over the coming months, the ODOT will address the following important issues, including:

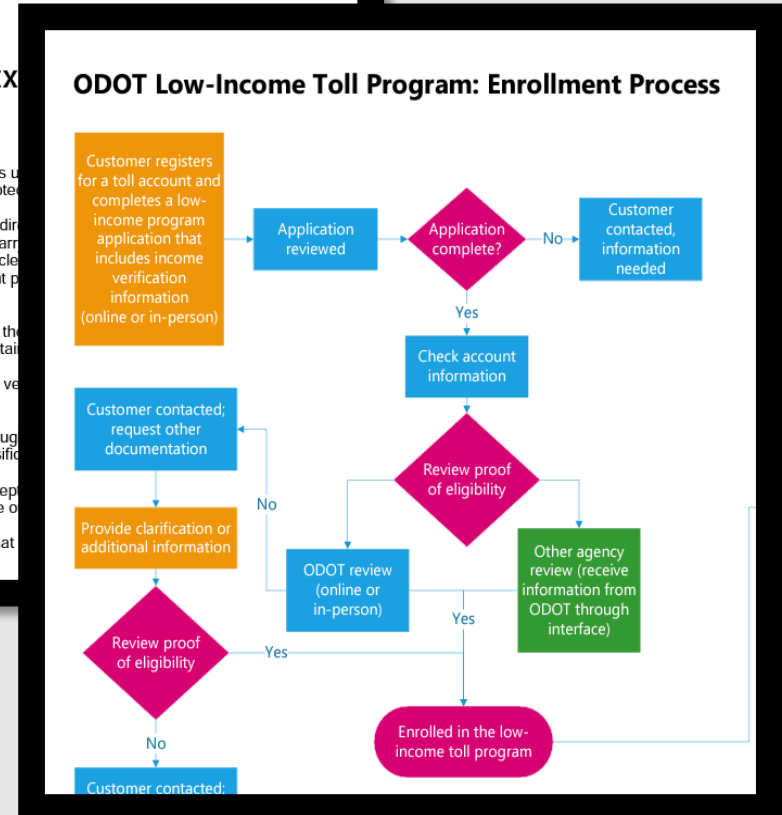
- Low-income toll program levels, types, and qualifications.


Draft Toll Rules
 Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
 Date Updated: September 15, 2023

Blue highlighted = state law

TOLL DISCOUNTS AND EXEMPTIONS
731-040-0080 Exempt Vehicles

- Except as provided herein, all vehicles used for personal purposes. Only qualified vehicles may be exempted.
- An exempted vehicle should connect directly to the toll rate monitoring and adjustment program. Exempted vehicles are subject to the toll rate monitoring and adjustment program. 0060 and 731-040-0061.
- The registered owner and operator of the vehicle must meet the requirements of the Department to obtain an exemption.
- To receive the exemption, the eligible vehicle must be registered with the Department.
- Eligibility status would be verified through:
 - Vehicle registration or classification with the Department; or
 - Information as deemed acceptable by the Department for the vehicle or registered vehicle owner.
- There is a limit of three (3) vehicles that may be exempted from a member account.



DISCUSSION ROADMAP

1. Clarifying questions and recommended adjustments to the enrollment process
2. Draft rules review



RECAP: JULY MEETING'S LEVEL 1 REVIEW – LOW-INCOME TOLL PROGRAM



- Concern for the impact tolling will have on workers, small businesses, and the economy
- Need for a simple system
- Interest in discounts for people experiencing a low-income, shift workers, and youth
- Need for significant education and awareness campaign



LOW-INCOME TOLL PROGRAM INPUTS

- Recognition of existing transportation funding sources and impact on people experiencing low incomes
- HB 3055 provided direction to develop an income-based toll program and required report to Legislature
- Past OTC decisions on the Low-Income Toll Report and Oregon Highway Plan Toll Amendment provided direction
- Equity and Mobility Advisory Committee's recommendations on strategy for program investment and accountability



RATIONALE FOR 200% FPL

- Ability to rely on existing service providers for income verification, similar to TriMet's Low-Income Fare Program (200% of FPL)
- 200% FPL is a common practice used by the few operating low-income toll programs
- People at this income-level face daily challenges to pay for basic survival needs
- Ability to attract certain users back to the toll facility

RATIONALE FOR AN ADDITIONAL BENEFIT LEVEL



- Avoid a single-tier benefit cliff
- Reach customers at the minimum wage, between 200% and 400% FPL (preschool teachers, cooks, home health care, etc.)
- Attempt to not further transportation cost burden on households
- EMAC has been strongly supportive of a 400% FPL benefit-level

TRAFFIC AND REVENUE ANALYSIS FOR I-205 TOLL PROJECT

		Value	Enrollment*	Revenue*	Traffic*
< 200% FPL Options					
1	100% discount	\$115	23.0%	-6.9%	+5.0%
2	50% discount	\$45	6.0%	-0.6%	+0.7%
3	Credit	\$45	6.0%	-1.0%	+0.7%
200 - 400% FPL Options					
9	Credit (small)	\$5	0.5%	0.0%	0.0%
10	Credit (larger)	\$20	0.5%	-0.1%	0.0%
11	25% discount	\$25	1.1%	-0.2%	+0.1%

FURTHER INVESTIGATION NEEDED FOR ADDITIONAL BENEFITS UP TO 400% FPL

**Verification
process**

**Revenue
impact**

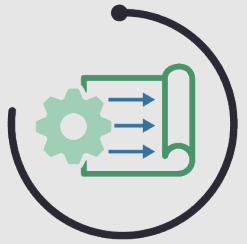
**Congestion
impact**

**Financing
risk**

**Schedule
impact**

**Operations
cost**

TOLL ADVISORY COMMITTEE ROLES IN THE LOW-INCOME TOLL PROGRAM



STRAC

- Enrollment and verification process (rules-level detail)
- Rate setting and adjustment (rules-level detail)

EMAC

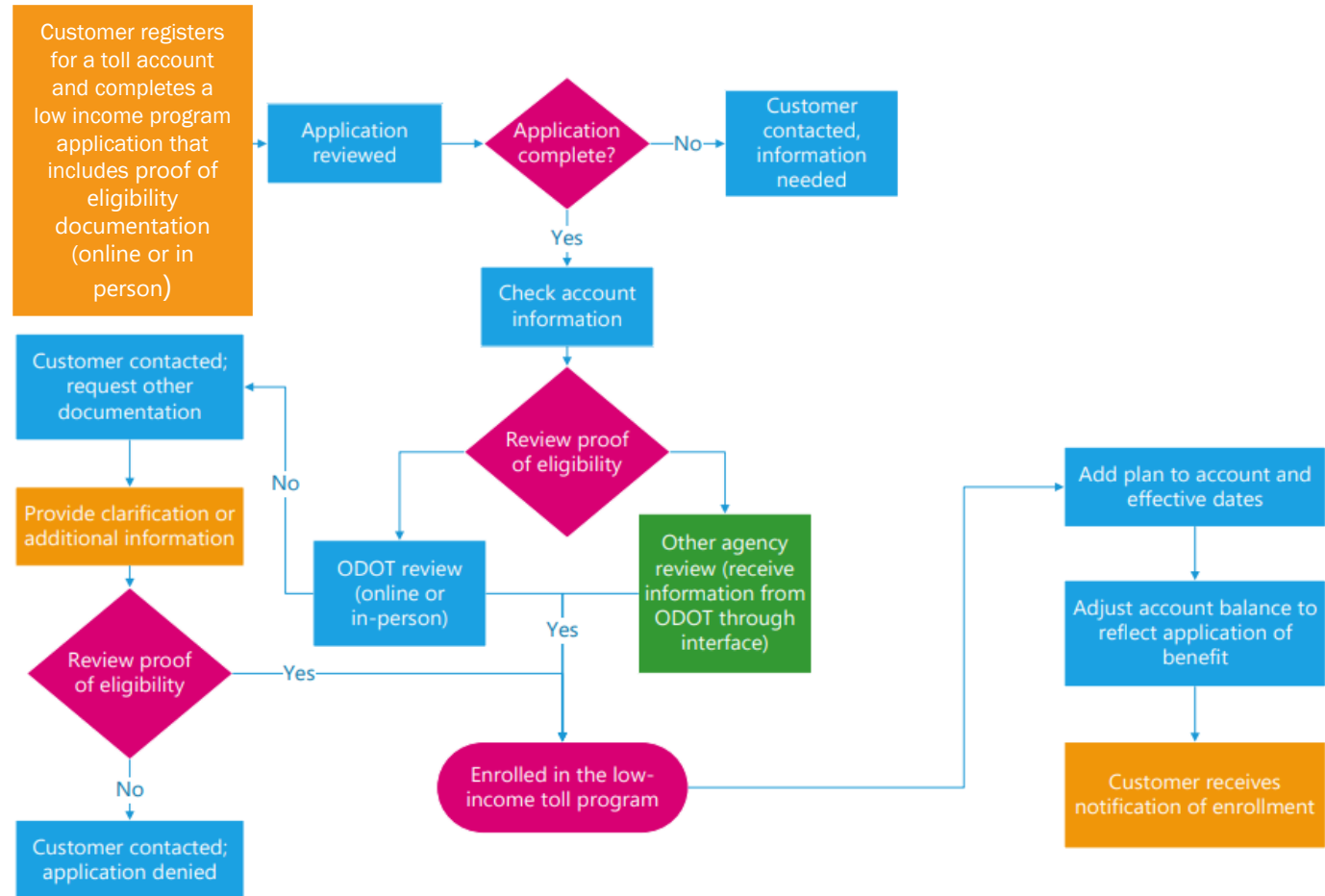
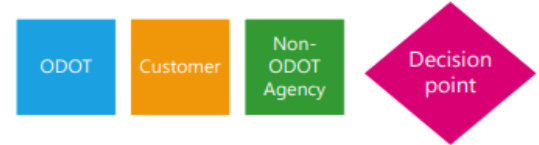
- Level of benefit (25%, 50%, 100%)
- Benefit type (credit, discount, or free trip)
- Enrollment process (engagement details)
- Adjustment and community involvement long-term (engagement details)



**LOW-INCOME TOLL PROGRAM:
ENROLLMENT,
BENEFIT DISTRIBUTION,
& RECERTIFICATION PROCESS**

ENROLLMENT

ODOT Low-Income Toll Program: Enrollment Process

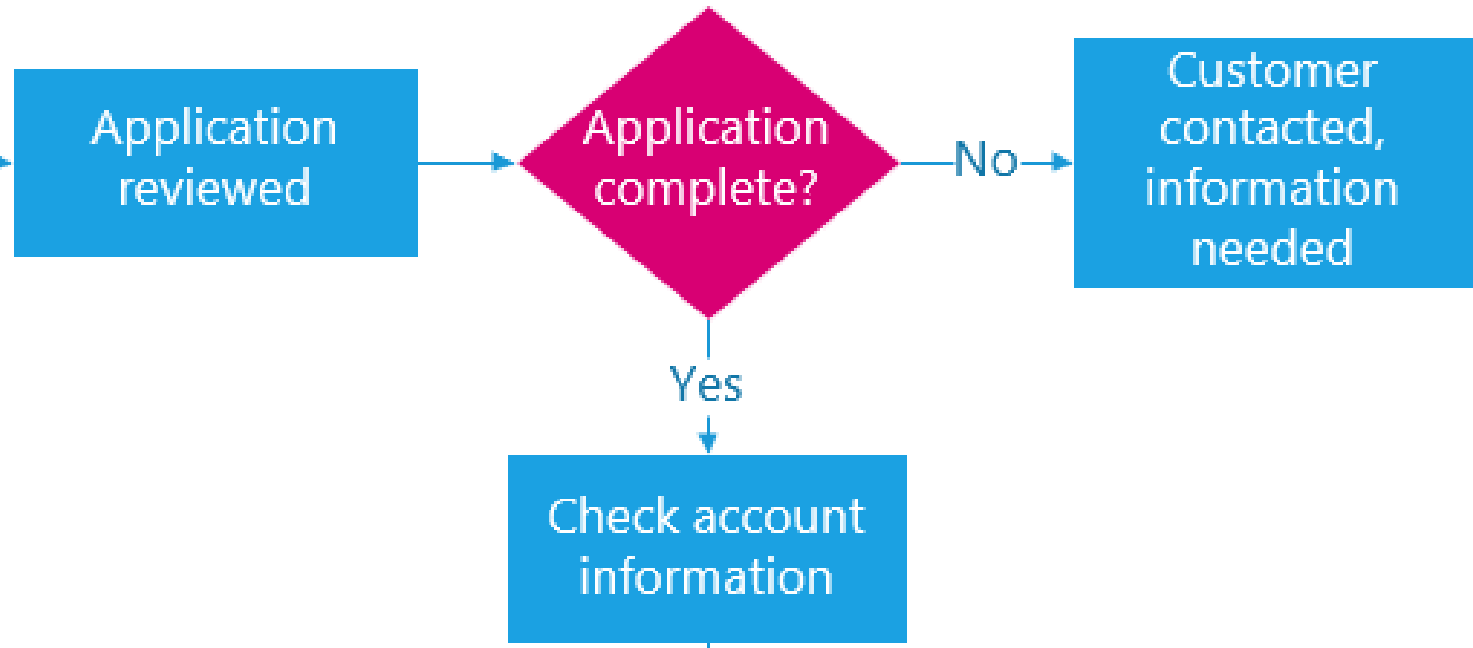


Note: This information identifies our August 2023 thinking for toll operations. It is provided to spur discussion and input to enhance our work. Changes will be made between now and when tolling begins as toll rules are established and more is learned through the implementation process. We are planning to make a toll operations system that is scalable and evolves to lessons learned along the way.

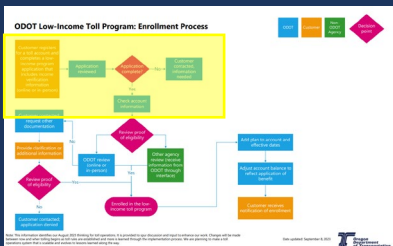
Date updated: September 8, 2023



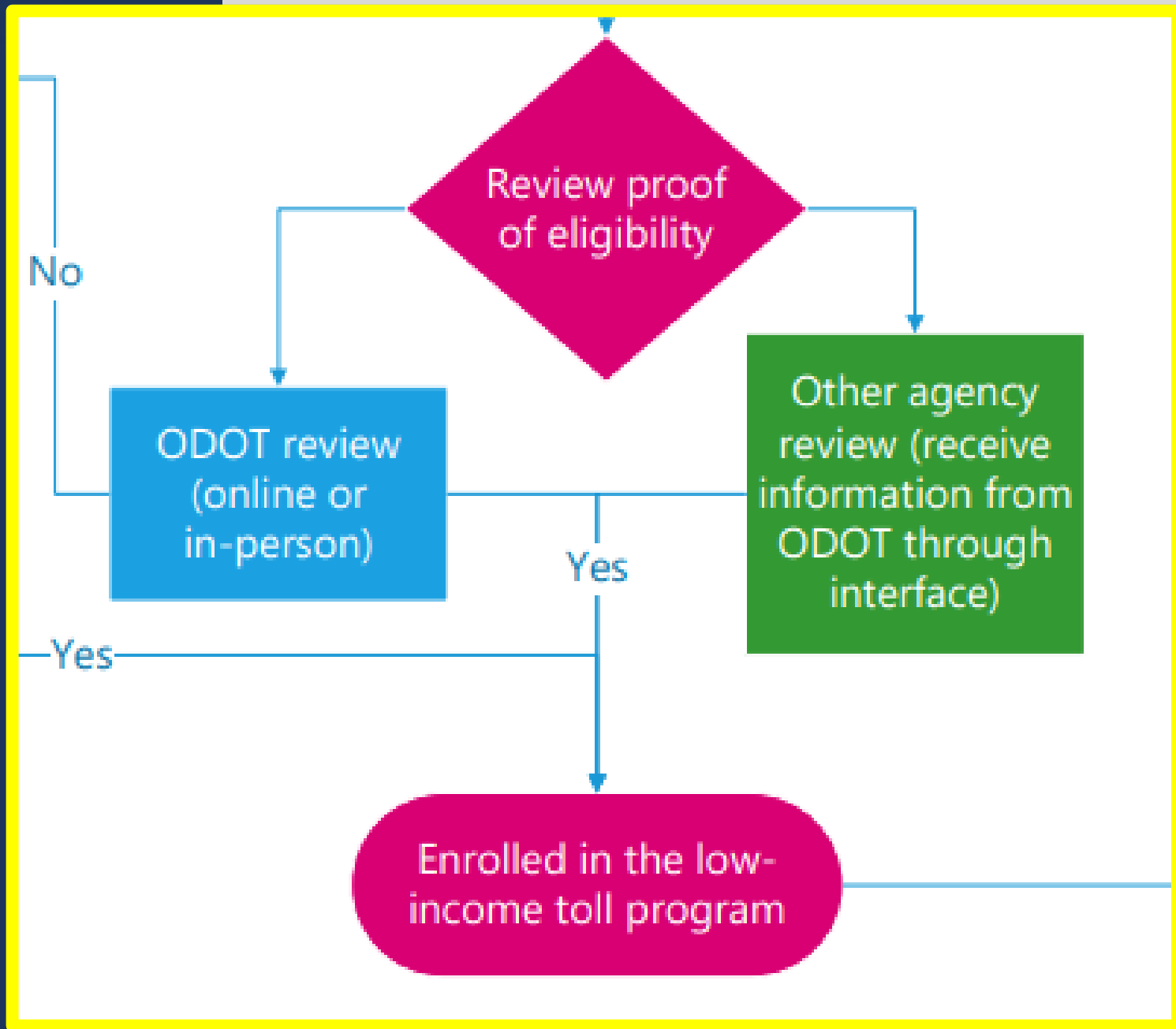
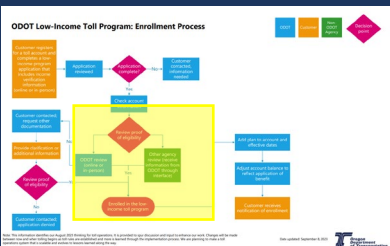
Customer registers for a toll account and completes a low-income program application that includes proof of eligibility documentation (online or in person)



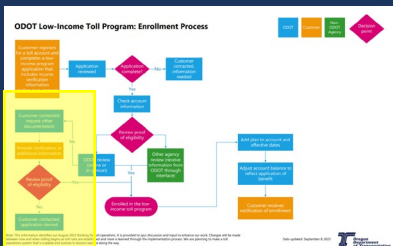
ENROLLMENT



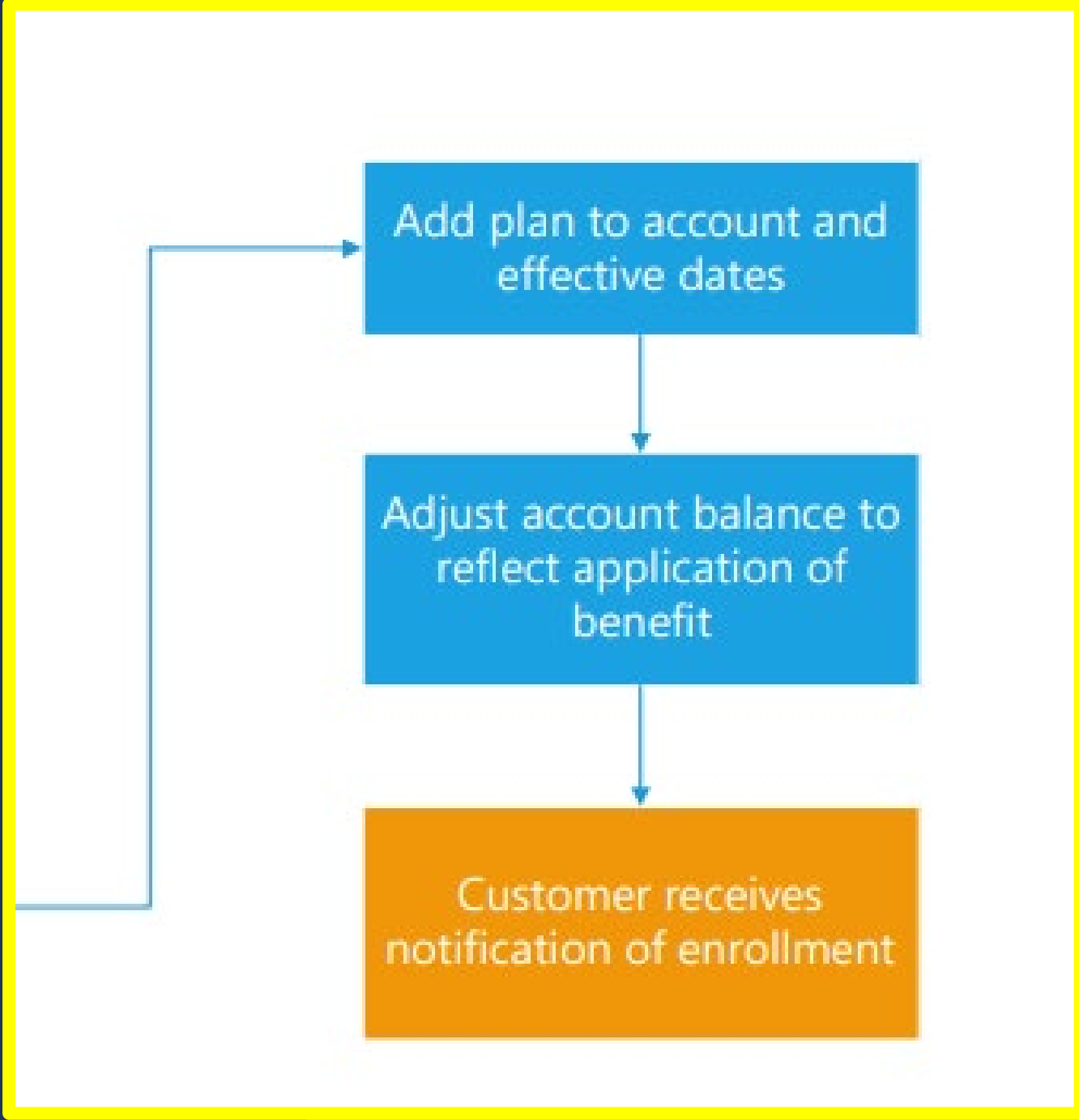
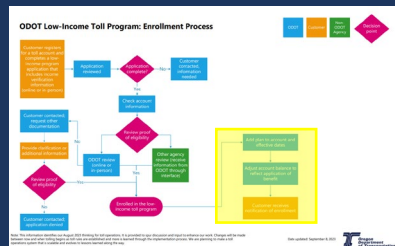
ENROLLMENT



ENROLLMENT

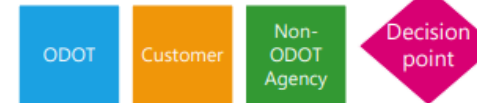


ENROLLMENT

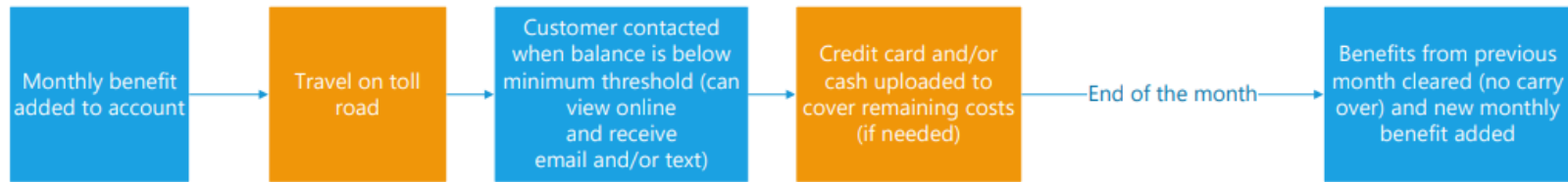


BENEFIT DISTRIBUTION

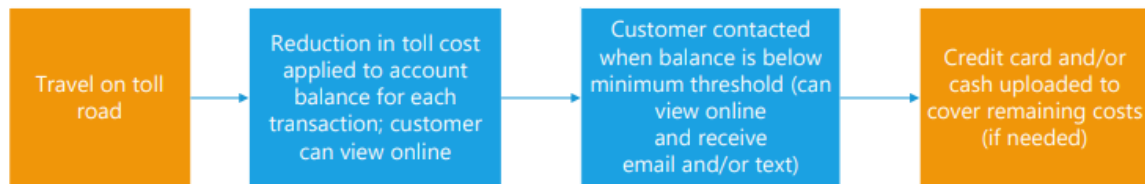
ODOT Low-Income Toll Program: Benefit Distribution



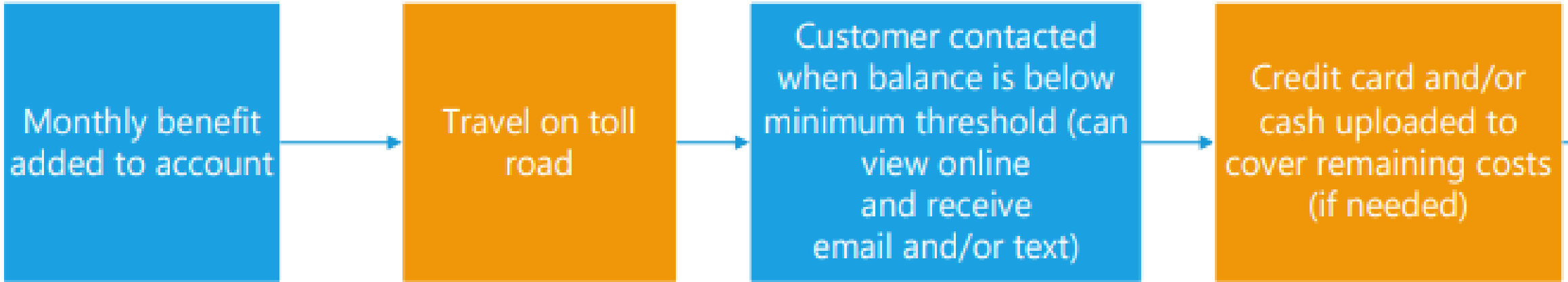
Option 1. Free trips (monthly) / Option 2. Credits (monthly)



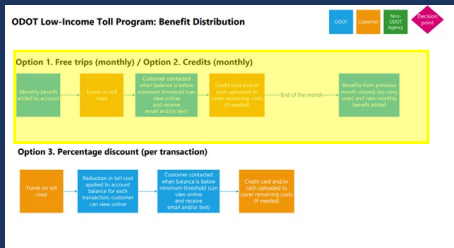
Option 3. Percentage discount (per transaction)



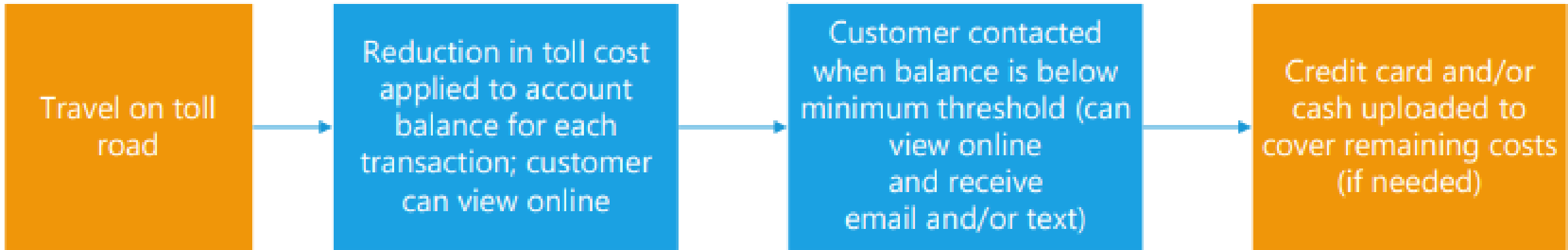
Option 1. Free trips (monthly) / Option 2. Credits (monthly)



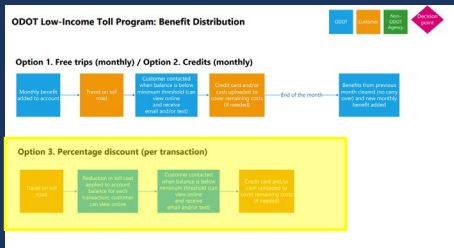
BENEFIT DISTRIBUTION



Option 3. Percentage discount (per transaction)

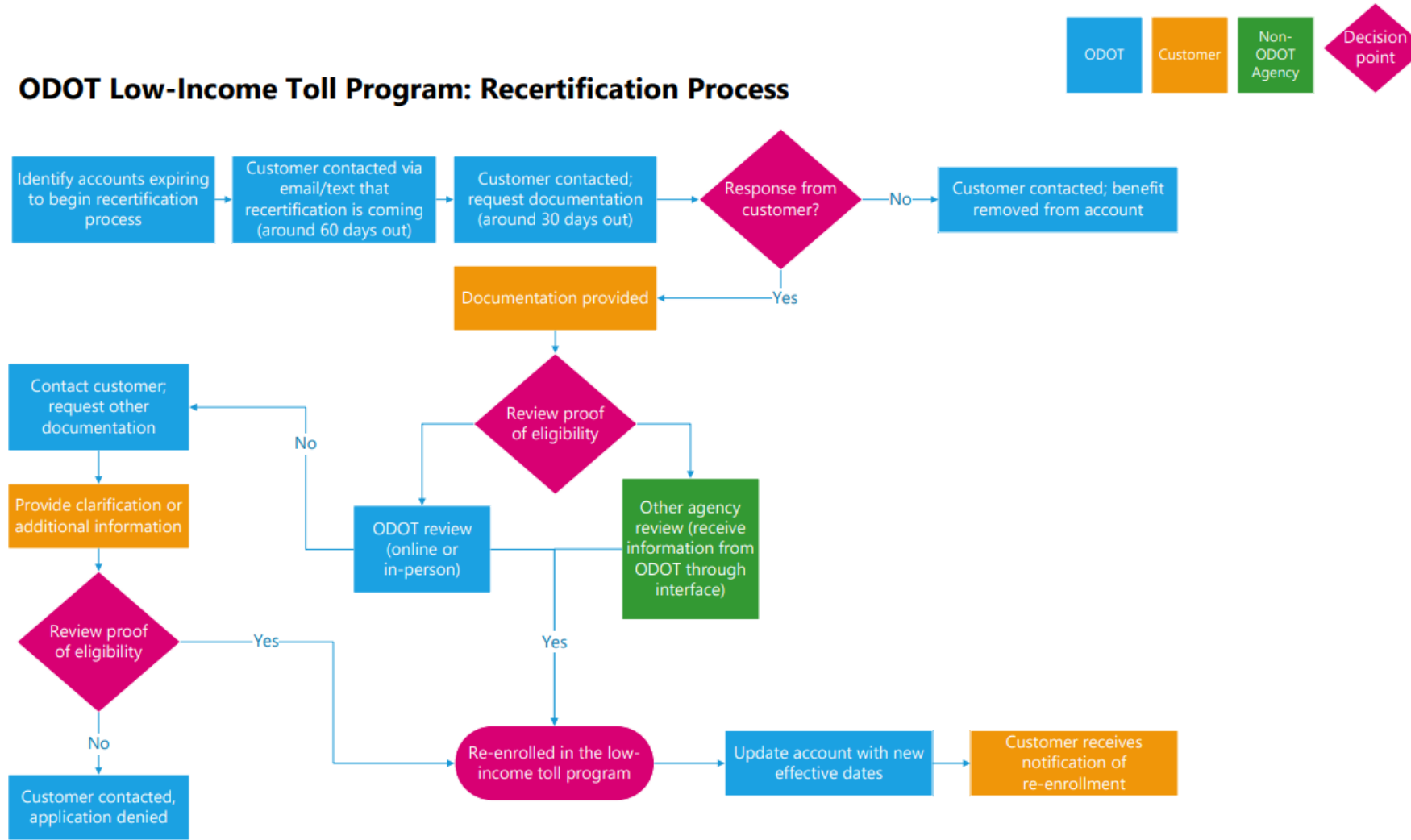


BENEFIT DISTRIBUTION



RECERTIFICATION

ODOT Low-Income Toll Program: Recertification Process



Note: This information identifies our August 2023 thinking for toll operations. It is provided to spur discussion and input to enhance our work. Changes will be made between now and when tolling begins as toll rules are established and more is learned through the implementation process. We are planning to make a toll operations system that is scalable and evolves to lessons learned along the way.

Date updated: September 8, 2023

Identify accounts expiring to begin recertification process

Customer contacted via email/text that recertification is coming (around 60 days out)

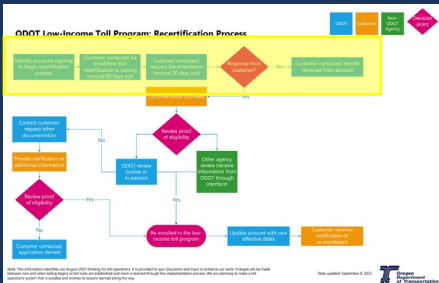
Customer contacted; request documentation (around 30 days out)

Response from customer?

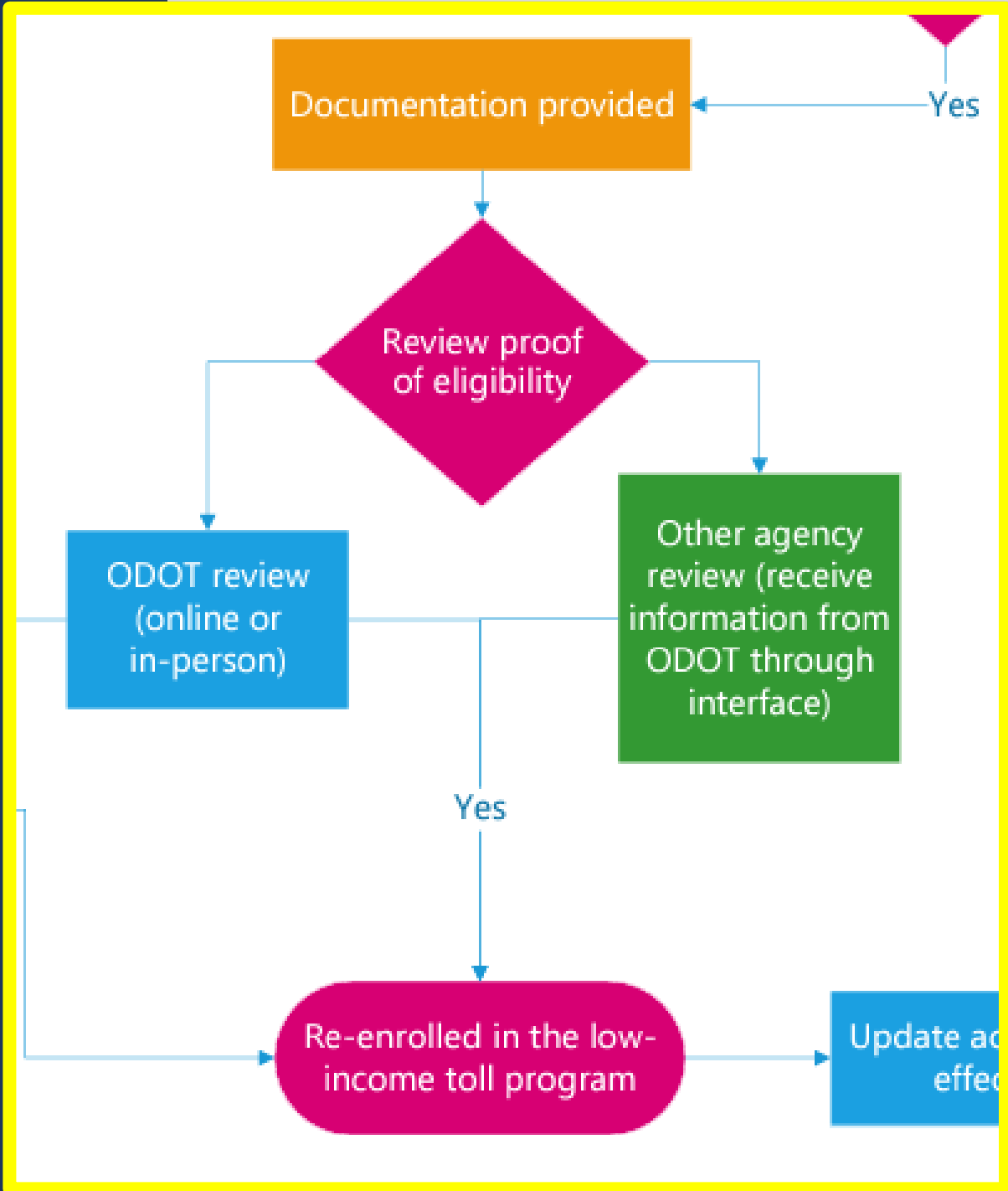
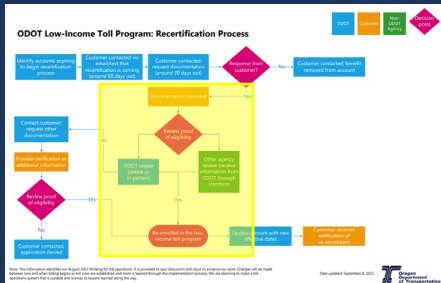
No

Customer contacted; benefit removed from account

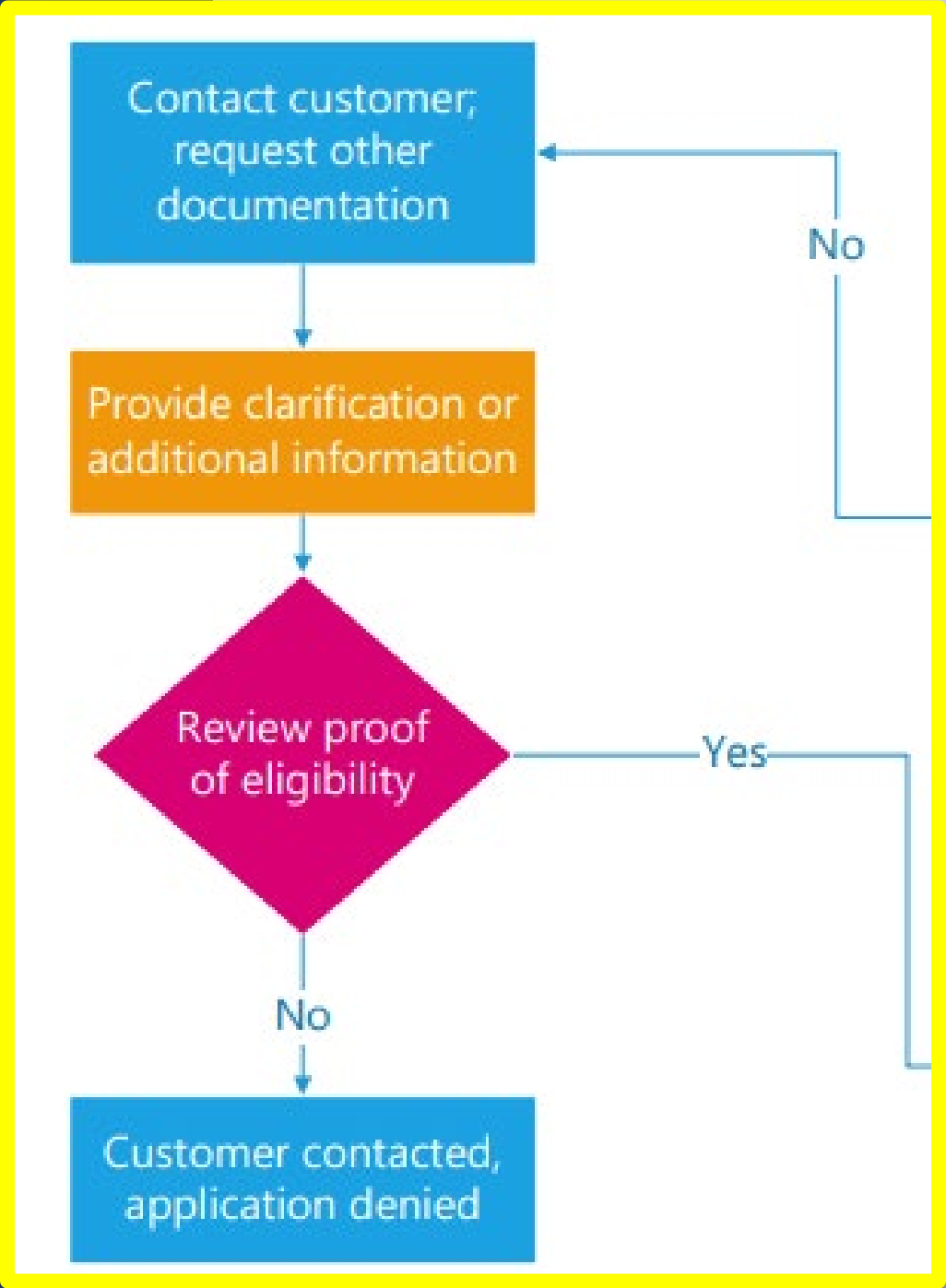
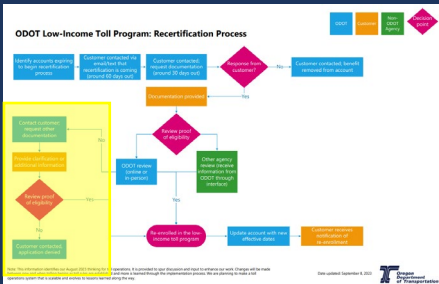
RECERTIFICATION



RECERTIFICATION



RECERTIFICATION

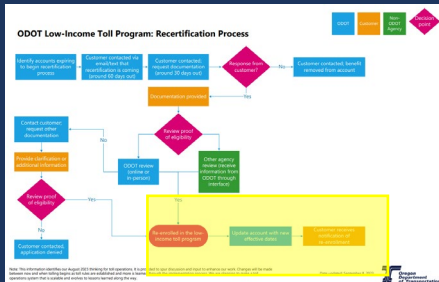


Re-enrolled in the low-income toll program

Update account with new effective dates

Customer receives notification of re-enrollment

RECERTIFICATION



Clarifying Questions?

DRAFT RULES: LOW INCOME TOLL DISCOUNT

Helpful feedback:

- Clarification questions
- Suggested edits
- Identifying areas that we missed or need further discussion



Draft Toll Rules

Statewide Toll Advisory Committee (STRAC) September 2023 Meeting Materials
Date Updated: September 15, 2023

Blue highlighted = state law

731-040-0081

Discounts Based on Income

- (1) ODOT will offer discounted tolls for those with qualifying incomes. Discounts will be removed, included, or revised as part of the toll rate adjustment process as described in OAR 731-040-0060 and 731-040-0061.
- (2) To receive the discount, the eligible **vehicle** must be connected to a registered toll account with the Department.
- (3) To qualify for the toll discount, the registered **vehicle owner** must have verifiable income that is equal to or below 200% of the Federal Poverty Level for the vehicle owner's household size.
- (4) When registering for an account, the **customer** will provide documentation to determine eligibility status and would be verified through one of the following:
- Registration that identifies the **vehicle classification type**, which is eligible for the discount;
 - Verification of enrollment in an **existing social services program** ([Oregon ONE Eligibility](#), etc.);
 - Information necessary for Department of Revenue to verify income-level;
 - Registration or classification information already held by the Department; or
 - Other documentation, as permitted by law.
- (5) There is a limit of three (3) vehicles that can be associated with an individual member account.

LOOKING AHEAD & NEXT STEPS



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

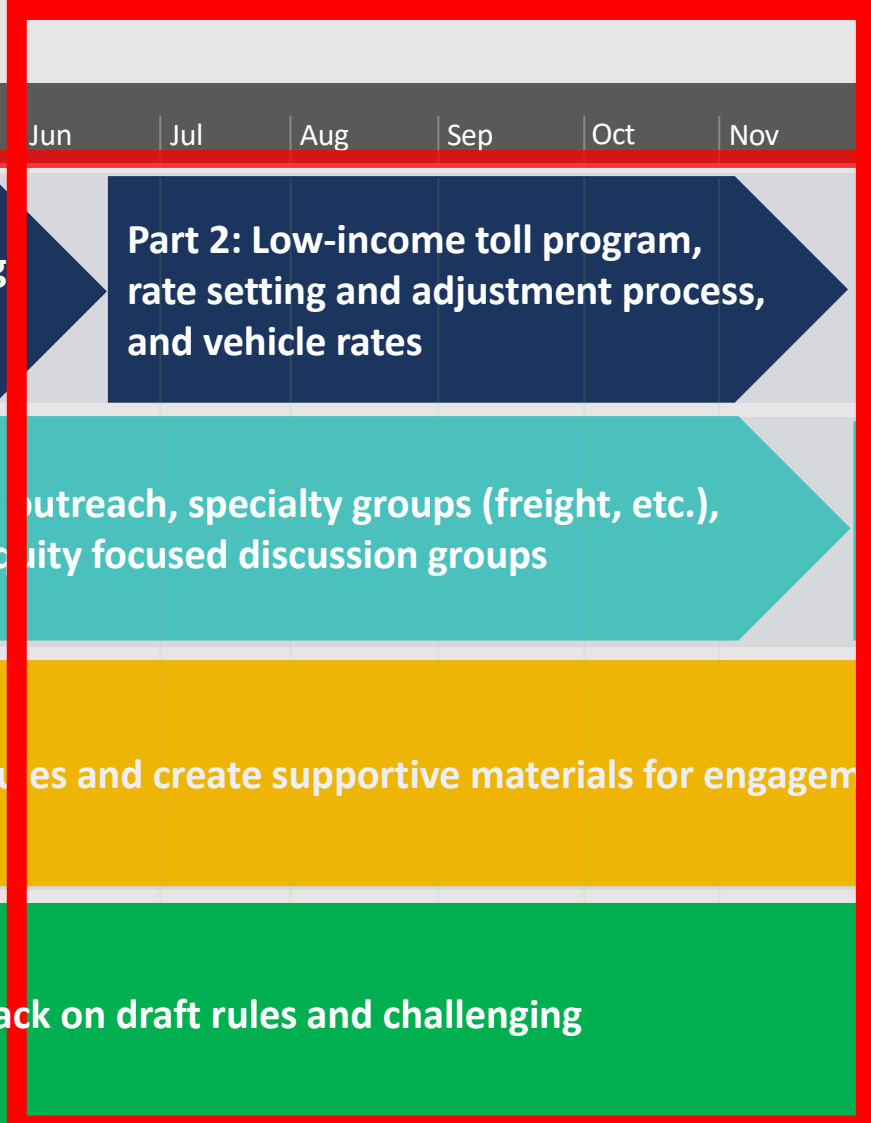
ODOT

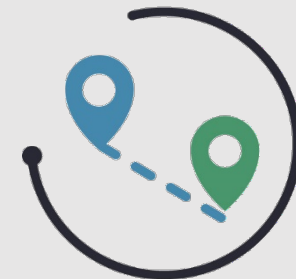
Draft and revise the draft rules and create supportive materials for engagement

OTC

Provide feedback on draft rules and challenging

Review & approve





LOOKING AHEAD

- 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)

COMMUNITY ENGAGEMENT



OREGON TRANSPORTATION COMMISSION AND ADVISORY COMMITTEES



EQUITY AND MOBILITY ADVISORY COMMITTEE (EMAC)

- Next Meeting:
October 4

OREGON TRANSPORTATION COMMISSION (OTC)

- Next Meeting:
November 9

REGIONAL TOLL ADVISORY COMMITTEE (RTAC)

- Next Meeting:
November 13

EQUITY & MOBILITY ADVISORY COMMITTEE (EMAC): REPORT OUT

- EMAC Meeting #24 on 10/4 at Ecotrust in Portland
- **Low-Income Toll Update**
 - OTC update
 - Type and level of **discount** for a low-income benefit
 - **Enrollment** rulemaking and policy
 - Trade-offs of **administrative cost and complexity**
- **Other topics**
 - RMPP Project options: equity criteria that's important to the analysis today and going forward
 - 2024 Work Plan

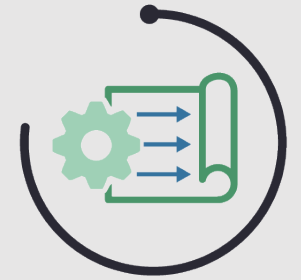
REGIONAL TOLL ADVISORY COMMITTEE (RTAC): REPORT OUT

- RTAC Meeting 10 – September 18
 - Reviewed and discussed RMPP Options and evaluation findings
 - Received an update on the processes for developing the Nexus Project list
 - Reviewed the Public Transportation Strategy (PTS) initial list of projects

- RTAC Meeting 11 – November 13
 - Review the draft Nexus Project list and refined PTS list
 - Discuss Abernethy Bridge toll scenario trade offs
 - Review Implementation Plan outline

UPCOMING ENGAGEMENT

- Survey
 - Open from September 26 – October 9
 - Feedback on tolling options on I-5 and I-205
- Engagement activities
 - Tabling
 - September 26th at Glenfair Elementary
 - September 27th at Forest Grove Farmer's Market
 - September 28th at Gladstone Senior Center



NEXT STEPS

- Evaluations to be sent after today's meeting
- Next STRAC meeting scheduled for October 27, 2023, 9:00am – 12:00pm



THANK YOU