

# IBTTA THREE-YEAR PLAN | 2019-2021



## FROM VISION TO REALITY

OCTOBER 1, 2018

**IBTTA**  
TOLLING. MOVING SMARTER.

# **IBTTA Three-Year Plan | 2019-2021**

## **October 1, 2018**

### **Table of Contents**

Three-Year Plan in Brief .....	3
Background .....	4
What Will the Members Get Out of This Plan? .....	5
Outcome 1: Strengthening Current Programs and Services .....	5
Outcome 2: Data and Analysis .....	6
Outcome 3: Knowledge Transfer .....	7
Outcome 4: Industry Vision .....	9
Where We've Been and Where We're Going .....	11
Three-Year Financial Forecast Narrative .....	12
Appendix 1: Three-Year Financial Forecast .....	14
Appendix 2: Dues Philosophy .....	15
Appendix 3: Proposed 2019-2021 Dues Structure .....	16
Appendix 4: North American Operators \$0 to \$125 Million .....	17
Appendix 5: North American Operators \$125 Million to \$2 Billion .....	18
Appendix 6: Biggest Changes You've Observed Since You Joined the Industry .....	19
Appendix 7: Key Issues on the Minds of IBTTA Board Members .....	20
Appendix 8: Major Accomplishments 2013-2017 .....	22

## IBTTA THREE-YEAR PLAN IN BRIEF

### What Is This Plan?

- It is a vision of what IBTTA wants to become in the next three years.
- It is a request for additional staff and funding to strengthen the programs and services we offer now and begin to achieve the new outcomes our members want.
- It is a proposed budget for 2019 and a rough outline of budgets for 2020 and 2021.
- It is an acknowledgment that we have “hit a wall,” that our current staff, consultant, and technology resources are fully engaged, and we cannot make new gains without additional resources.
- It is a description of the tremendous opportunities that lie ahead for IBTTA and its members.
- It is a description of the investments we need to make over the next three years to do what’s most important to serve our members in keeping with our strategic plan.

### What Will the Members Get Out of This Plan?

- **OUTCOME 1: STRENGTHENING CURRENT PROGRAMS AND SERVICES.** These include meetings, advocacy, and communications.
- **OUTCOME 2: DATA AND ANALYSIS.** A fully mature **TollMiner™ data product** with key information on every toll facility and operator in the world.
- **OUTCOME 3: KNOWLEDGE TRANSFER.** Developing a more systematic way of capturing the knowledge that resides in the minds of individual experts and practitioners in the IBTTA community and making that knowledge more accessible to all members.
- **OUTCOME 4: INDUSTRY VISION.** Integrating our industry more appropriately into the fabric of the larger transportation community.

### How Will We Pay for These New Investments?

This plan proposes a dues increase phased in over three years. See **APPENDIX 1-5** for a full description of the three-year financial forecast and dues increase.

## BACKGROUND

This document outlines a plan for IBTTA for the next three years, 2019 – 2021. It connects our strategic plan with our vision of the future and the new programs we must advance to stay relevant as an association.

In July 2012, the IBTTA Board of Directors met in Atlanta to discuss the future of IBTTA, its major communications campaign, and how to pay for it. After months of discussion and deliberation, the Board realized that while IBTTA had a strategic plan, it didn't have the resources to implement it. Our major objective in 2012 was to launch an ongoing, proactive, and permanent communications campaign to position tolling in a positive light and give it a seat at the table for important policy discussions. We've been successful in doing that.

This moment in 2018 feels a lot like 2012 in terms of the opportunities and challenges we face. Back then, we rose to the challenge of creating and launching a communications campaign that everyone agrees we should have been doing for years but we simply didn't have the money to do. The results of our communications campaign over the last six years prove that when we commit to do something and dedicate appropriate resources to do it, we can be successful.

Now we're called again to advance with even greater vigor the major goals of our strategic plan, which are to:

- Enhance our clearinghouse of key industry data – TollMiner.
- Create indispensable value for members and stakeholders in our programs, products, services, and meetings.
- Advance policies that facilitate tolling and other forms of user charging.
- Effect positive outcomes in transportation.

We have a highly motivated, talented and energetic staff that is committed to the membership and mission of IBTTA and functions as a team. Nowhere is the dedication of staff more apparent than in the results it has delivered over the past five years. As dedicated and capable as our staff is, it is also now stretched to the limit of its abilities. We have hit the proverbial wall. We have grown the work of IBTTA significantly over the last five years while growing the staff size only marginally. Therefore, if we want to do more and offer more programs and services that are essential to members, we need more resources including people, technology and systems.

## **WHAT WILL THE MEMBERS GET OUT OF THIS PLAN?**

### **OUTCOME 1: STRENGTHENING CURRENT PROGRAMS AND SERVICES.**

Anyone who has spent any time with IBTTA knows what we're good at. We excel in putting on world class meetings that are known for excellent, relevant content, high production value, and valuable networking opportunities. We excel in advancing an industry-wide communications campaign that has helped foster more positive news coverage of our industry. We excel in advancing government affairs efforts which, combined with our communications campaign, have created a public policy environment more favorable to tolling. These programs are IBTTA strengths. Under this three-year plan, we intend to build on these strengths.

While our meetings, communications, and advocacy efforts are appreciated and well received, there is always room for improvement. To strengthen the content and execution of our meetings, we must:

- Develop a broader view of tolling and its future to attract a wider mix of delegates representing ITS, transit, state departments of transportation, metropolitan planning organizations, international and other audiences.
- Reach beyond traditional speakers to include new voices from academia, think tanks, local governments, environmentalists, and catalysts of the new economy.
- Reach deeper into member organizations to attract young professionals and encourage IBTTA stalwarts to engage the next generation of leaders who have a different perspective on the industry.
- Focus more attention on alternative ways to delivering educational content to serve those with limited ability to travel.
- Expand content delivery methods that encourage more interactivity and participant driven learning.
- Expand and support international membership outreach and the needs of non-US based members.

**How Members Benefit.** Members will come away from IBTTA education programs with a better chance to address challenges at home because of access to a wider spectrum of experts, more robust webinars and distance learning, new voices, and more timely and interactive content delivery.

**OUTCOME 2: DATA AND ANALYSIS. A fully mature TollMiner data product with key information on every toll facility and operator in the world.**

Good data helps us manage and grow every aspect of our work: communications, advocacy, business development, marketing, meetings, and the day to day operations of all our businesses.

Two years ago, we began to build TollMiner, IBTTA's data visualization tool. Our goal is to have it become the most important and effective repository of toll industry information for the benefit of our members and others who need it. Because of the information we've collected in TollMiner to date, we know that there are 129 distinct tolling entities in the US operating 332 separate toll facilities with 6,027 center line miles in 35 states. We also know there are 46 priced managed lane facilities in 11 states covering 644 center line miles operated by 25 distinct entities.

We didn't know these things two years ago and this is just the beginning. We know them today because we went out and meticulously collected the data from publicly available sources and from our members and put them into a robust data visualization tool. Now our members can know, on a daily basis, the extent of tolling in the US. We are increasing our knowledge about the industry every day, adding new data elements such as traffic and revenue figures for each toll operator.

This is a painstaking and laborious process. There are no shortcuts in collecting, cleaning, verifying, and displaying accurate data. How long does it take to plan and conduct the decennial US Census? Years. In a similar way and with limited resources, we have begun to collect the most important data on tolling. The members appreciate that we're making progress and that we have much more to do.

We can feel the opportunity but are stifled by the lack of resources. Wouldn't it be great if someday we have relevant data on every toll facility and operator (members and non-members) from around the world? It's a lofty goal, but eminently achievable with the right resources.

**How Members Benefit.** With our tolling data visualization tool TollMiner we have identified more than 60 "use cases" or questions that we can now answer about every toll agency and facility in the U.S. We have also identified nearly two dozen more use cases that we intend to answer in the next couple of years. We will continue to work on expanding not only our data set but also the use cases and analytical tools that will help toll agencies, consultants and vendors to see their own metrics in relation to others and make better business decisions. This, we believe, will be a major benefit to our members.

**OUTCOME 3: KNOWLEDGE TRANSFER. Developing a more systematic way of capturing the knowledge that resides in the minds of individual experts and practitioners in the IBTTA community and making that knowledge more accessible to all members.**

In the partnership between members and staff that defines IBTTA, we provide indispensable value to members and stakeholders in countless ways. From our 5-6 educational meetings each year, to our advocacy and government affairs efforts, to our communications campaign, TollMiner, daily newsletter and more, IBTTA is an ongoing collaboration that transforms member needs into solutions.

***Addressing Current Issues***

While emerging issues are often fun to explore, they often compete with efforts to resolve issues that are vital to current tolling operations.

For example, some experts have pointed out that critical back office, toll lane, call center, and related technology systems at many toll agencies are either reaching end of life or becoming obsolete. From this perspective, one can argue that while we must examine the new needs of the future (CAV, MaaS, RUC, etc.), we can't ignore the need to maintain and upgrade current systems that keep toll agencies in business.

To best serve our members, we need to be nimble and agile. We need to be poised to help them not only address current challenges (maintain and upgrade current systems, etc.) but also help them figure out how to address new developments. IBTTA is like a horseback rider standing on two different horses at the same time: one horse represents the present and the other represents the future. While we run the risk of falling off, we must continue to ride them both.

***Deeper peer to peer networking beyond formal meetings***

Late last year, we asked IBTTA board members to talk to us about key issues on their minds. One item that came up repeatedly was the idea of creating opportunities for peer networking and exchange outside of formal meetings. One board member said:

*"Peer to peer interaction is key. We need to make sure we have other channels of communication open to our peers in the industry. We have subject matter experts in different disciplines in our organization, but a lot gets lost. How do we add to what we're currently doing to get higher levels of communication among other agency staff?"*

A key role for IBTTA in the coming years is to help our members cope with current and future operational issues by developing the capability to bring experts together, curate and disseminate appropriate information about effective practices, and provide a forum for members to incubate new ideas. One example of how IBTTA is already fostering this type of

collaboration is through the active and robust CAV Working Group. Working Groups enable our members to build strong bonds and learn from one another, especially those who are not able to travel to in-person meetings. Also, under the leadership of First Vice President Chris Tomlinson, IBTTA is developing a peer to peer exchange pilot program that will launch in 2019.

### ***Addressing Emerging Issues: Example – Connected and Automated Vehicles***

On June 23, 2018, the IBTTA Board held a three-hour long discussion in Harrisburg, PA on the future of Connected, Automated, Shared and Electric (CASE) Vehicles. According to the post-board meeting survey, 17 of 17 Board members responding were satisfied or very satisfied with the CASE vehicle discussion. In response to the question “What was your favorite aspect of the Board meeting?” 8 of 10 Board members mentioned the CASE discussion, future vision, emerging issues, or “looking at new ways to improve transportation.” It appears that board members like to be engaged in these discussions and believe that focusing on the future is one of their main roles.

The discussion at the board meeting was a natural culmination of discussions about connected and automated vehicles that have been percolating in IBTTA and the industry for several years. IBTTA’s Platinum Sponsor Advisory Council has been looking at the issue for more than a year. And IBTTA’s CAV Working Group, which formed in June 2017 and has held monthly conference call since then, also set the stage for the board discussion. All of these discussions are natural outgrowths of the fact that several toll agencies are conducting CAV testing on their facilities including truck platooning and partial or fully autonomous vehicle testing.

We believe that CAV will have a significant effect on the operations and future financing of toll facilities. As one of the presenters on a CAV session said at the Portland Finance Summit in July, “Everyone is going to change their behavior, but they are not all going to change their behavior in the same way.” As an association, we need to have a much better understanding of those changes in behavior, how they will affect the tolling industry, and how we can positively affect federal and state policy discussions to recognize the needs of toll operators in this area.

**How Members Benefit 3.** Knowledge transfer is about developing a more robust and systematic way of capturing the knowledge that resides in the minds of individuals in the IBTTA community (experts, practitioners, etc.) and making that knowledge more accessible to all members. Acting independently, individual members could spend millions of dollars acquiring the knowledge and skills to effectively address the current and emerging issues they confront. As IBTTA board member Mark Compton put it, “If I do it myself, it costs more and won’t go anywhere.”



**OUTCOME 4: INDUSTRY VISION. Integrating our industry more appropriately into the fabric of the larger transportation community.**

Transportation is changing extremely rapidly. We have seen more rapid change in transportation in the last five years than we've seen in the previous 10 years. And that accelerating pace of change is likely to continue. **APPENDIX 6** contains a rollup of some of the biggest changes our members have observed since joining the industry.

In November 2016, IBTTA convened a "Transportation Visioning Summit" with leaders of 18 transportation-related associations and societies. The purpose of the summit was to develop a vision for a federal transportation program that addresses current and future challenges. While the summit did not conclude with a single vision, the event is considered an important step in advancing a common vision among major transportation groups.

That summit touched on a wide range of important issues including autonomous and connected vehicles, smart cities and smart design, the future of freight and goods movement, and making the case for infrastructure investment. As robust as the discussions were at the time, no one in that day-long meeting of transportation leaders used the expression "mobility as a service." And, yet, today it's hard to read an article about transportation without constantly coming across that phrase.

Indeed, two new associations have recently sprung up with "mobility as a service" in the name. One is called the Mobility as a Service Alliance, which Ertico formed as a public private partnership primarily serving Europe. The other is called the Mobility as a Service Association formed by tolling and ITS industry veterans Jack Opiola and Tim McGuckin.

Are these new associations our competitors? Who knows. The important thing to note is that change is happening very rapidly, and we should be asking ourselves some important questions:

- What is the significance of Mobility as a Service (MaaS) to the tolling industry?
- What effect will connected and automated vehicles have on transportation in general and tolling in particular?
- What is the future of Road Usage Charging and which institutions – states, telecom companies, toll operators – will take the lead in advancing RUC?
- How will global efforts to address climate change affect automobile design and production and what influence will these changes have on our industry?
- What effect will all of these changes have on our industry's appetite for credit and the decisions of rating agencies?

These are existential questions. Our members are rightfully concerned about the future (and their livelihood) because of rapid changes and uncertainty.

But these are also times of great promise. For individuals and institutions that position themselves to embrace change, the future can be bright. We at IBTTA want to help our members experience a bright future, whether road funding and finance continues in its present form or it takes on a completely different form.

Looking to the future, we need to prepare IBTTA to continue to be relevant to our members. One board member recently observed:

*“Digitalization of information and introducing new means of payment are huge issues for us. If we don’t reflect on this, then other industries like telecom will do it for us. It will be a hurricane for the whole world of transportation. Are we prepared just to be in charge of the maintenance of assets?”*

**APPENDIX 7** contains a rollup of other key issues on the minds of Board members.

**How Members Benefit.** IBTTA members benefit when their association follows the advice of hockey great Wayne Gretzky to “Skate to where the puck is going, not where it has been.”

## WHERE WE'VE BEEN AND WHERE WE'RE GOING

Like a well-run toll agency that understands the importance of maintaining existing assets, we need to invest in IBTTA to maintain the asset we've built over the years.

In the past several years, we've focused on growing the membership and committed ourselves to a steadily growing effort to directly respond to member requests for better data, which has culminated in TollMiner. At the same time, we have worked very hard to stringently manage expenses. There is a strong recognition among the Board and members that costs will increase even if we just "stay the course" on current operations. Chris Tomlinson expressed it well during the June Board meetings in Harrisburg when he said, "looking out over three years in all of our organizations the one thing you can count on is that costs escalate over time."

During that same Board meeting, we identified many IBTTA programs or activities that didn't exist as recently as five years ago. **APPENDIX 8** contains a rollup of major accomplishments from 2013-2017. We support all of those activities today without having had a dues increase since 2015.

Beyond maintaining the current asset we've built, we also need to upgrade and improve the asset to support the growing list of things our members are asking us to do to respond to future challenges like Data, CAV, MaaS, RUC, etc. In response to June Board Survey question, "What program or activity do you most believe IBTTA should STOP doing?" one board member responded simply, "There is no program/activity to stop." In other words, "keep doing what you're doing, and do all these new things, too!"

## NEW DIRECTIONS IN 2019-2021

In this plan, we have described in four broad categories the outcomes that we believe IBTTA should focus on over the next three years:

- **Outcome 1: Strengthening current programs and services.** These include meetings, advocacy, and communications.
- **Outcome 2: Data and analysis.** A fully mature **TollMiner data product** with key information on every toll facility and operator in the world.
- **Outcome 3: Knowledge transfer.** Developing a more systematic way of capturing the knowledge that resides in the minds of individual experts and practitioners in the IBTTA community and making that knowledge more accessible to all members.
- **Outcome 4: Industry vision.** Integrating our industry more appropriately into the fabric of the larger transportation community.

How did we identify these specific outcomes? We asked for and listened to inputs from members who have completed post-meeting surveys over the last two years; the IBTTA board in one-on-one interviews and in group discussion at board meetings; member who have

participated in conference planning meetings or served on meeting planning groups; all of the committees serving IBTTA in any capacity, including board committees, functional committees, platinum sponsors, and the IBTTA Foundation Board; and IBTTA staff.

## **THREE-YEAR FINANCIAL FORECAST NARRATIVE**

The three-year financial forecast in **Appendix 1** is intended to help IBTTA achieve the major outcomes that we've outlined in this document. Here we describe the basic assumptions and drivers of this forecast.

### **REVENUES**

**Membership Dues:** Membership revenues will be driven by the dues structure described in **Appendix 3**. There are different percentage increases for different classes of members. If you think of 100% of the dues increase happening over three years, 50% of the increase takes effect in 2019; 30% of the increase takes effect in 2020; and the final 20% of the increase takes effect in 2021. This model assumes that the number of members stays **constant**. It also assumes that the toll revenues of Active members remain constant. In other words, we do **not** project that a toll operator will move from one dues category to another. Obviously, we expect the number of members to **increase**. However, to be conservative, we neither assume an increase in the number of members nor a movement of members from a lower dues class up to a higher dues class based on a toll revenue increase.

**Meetings (Registration, Sponsor, Exhibit):** This model assumes that meeting revenues increase 5% per year for the period 2018 through 2021.

### **EXPENSE**

**Personnel and Benefits:** This model assumes an annual market adjustment in salaries of 3% per year for the period 2018 through 2021. In 2019 we add two staff: one administrative staff to support activities throughout the company; and one research associate to help with data analytics (TollMiner). In 2021 we add another staff to help with TollMiner consulting services, analysis, products, etc.

**Communications:** This model assumes a 5% increase in the cost of communications consulting costs in 2019 and a 2% increase each in 2020 and 2021.

**Data Analytics:** This model assumes we add a consultant subject matter expert and technology in 2019 that continues in 2020 and 2021. There is a 2% increase each in 2020 and 2021.

**Public Affairs:** This model assumes we add a consultant subject matter expert who works in 2020 and 2021 on research and writing in the run up to federal transportation reauthorization.

**Member Services:** This model assumes a 2% increase per year for the period 2018-2021.

**Revenue Generating Meetings:** This model assumes a 2% increase per year for the period 2018-2021.

**Board and Administrative Meetings:** This model assumes a 2% increase per year for the period 2018-2021.

**Office Administration:** This model assumes a 2% increase per year for the period 2018-2021.

**APPENDIX 1: THREE-YEAR FINANCIAL FORECAST**

Description of Items	2018 Budget	2019	Dif '19 - '18	2020	Dif '20 - '19	2021	Dif '21 - '20
<b>Association Income</b>							
Membership Dues	\$ 2,798,957	\$3,176,733	\$ 377,776	\$3,436,248	\$ 259,515	\$3,612,728	\$ 176,481
Meetings (Registration, Sponsor, Exhibit)	2,357,321	2,478,121	\$ 120,800	2,602,027	\$ 123,906	2,732,128	\$ 130,101
Total Income	\$ 5,156,278	\$5,654,854	\$ 498,576	\$6,038,275	\$ 383,421	\$6,344,857	\$ 306,582
<b>Association Expense</b>							
Personnel & Benefits	\$ 2,372,266	\$2,731,434	\$ 359,168	\$2,813,377	\$ 81,943	\$3,041,778	\$ 228,401
Program Related		-		-		-	
Communications	257,550	269,850	12,300	275,247	5,397	280,752	5,505
Data Analytics	175,000	325,000	150,000	331,500	6,500	338,130	6,630
Public Affairs	60,000	60,000	-	136,200	76,200	138,924	2,724
Member Services	287,350	293,097	5,747	298,959	5,862	304,938	5,979
Revenue Generating Meetings	1,322,700	1,349,154	26,454	1,376,137	26,983	1,403,660	27,523
Board and Administrative Meetings	91,450	93,279	1,829	95,145	1,866	97,047	1,903
Office Administration	507,103	517,245	10,142	527,590	10,345	538,142	10,552
	\$ 5,073,419	\$5,639,059	\$ 565,640	\$5,854,155	\$ 215,096	\$6,143,371	\$ 289,217
Association income over expense before investment income	\$ 82,859	\$ 15,795	\$ (67,064)	\$ 184,120	\$ 168,325	\$ 201,485	\$ 17,365

**SUMMARY OF CHANGES IN REVENUE AND EXPENSE BY MAJOR FUNCTIONAL CATEGORY**

	2019	2020	2021
<b>REVENUE</b>			
Membership (Rev)	See Appendix 3	See Appendix 3	See Appendix 3
Meetings (Rev)	5% increase	5% increase	5% increase
<b>EXPENSE</b>			
Personnel & Benefits	3% market adjustment + <b>2 FTE</b>	3% market adjustment	3% market adjustment + <b>1 FTE</b>
Communications	5% increase	2% increase	2% increase
Data Analytics	Add <b>1 Consultant SME</b>	2% increase	2% increase
Public Affairs	No increase	Add <b>1 Consultant SME</b>	2% increase
Member Services	2% increase	2% increase	2% increase
Revenue Meetings	2% increase	2% increase	2% increase
Administrative Meetings	2% increase	2% increase	2% increase
Office Administration	2% increase	2% increase	2% increase

## **APPENDIX 2 – DUES PHILOSOPHY**

When the IBTTA Board approved a dues increase in 2012, they adopted a dues philosophy to ensure that the dues increase would be appropriate for each category of member. We propose the same dues philosophy for the proposed 2019-2021 dues increase.

Here are the principles of the dues philosophy:

1. All members experience some level of dues increase.
2. Preserve, more or less, the relative share of dues contributed by each of the major classes of members.
3. Obtain the largest portion of the dues increase from the largest agencies and companies that are capable of absorbing the dues increase (e.g. Large and Extra Large North American Active members and Sustaining members).
4. Improve the fairness of the dues structure between the smallest and the largest Active Members in terms of dues paid as a portion of toll revenues.

The chart on the next page shows the effect of the proposed dues increase on every category of member in this order:

- North American Active (toll operator) members
- Non-North American Active (toll operator) members
- Group Members
- Associate Members
- Sustaining Members
- DBE Members

**APPENDIX 3: PROPOSED 2019-2021 DUES STRUCTURE**

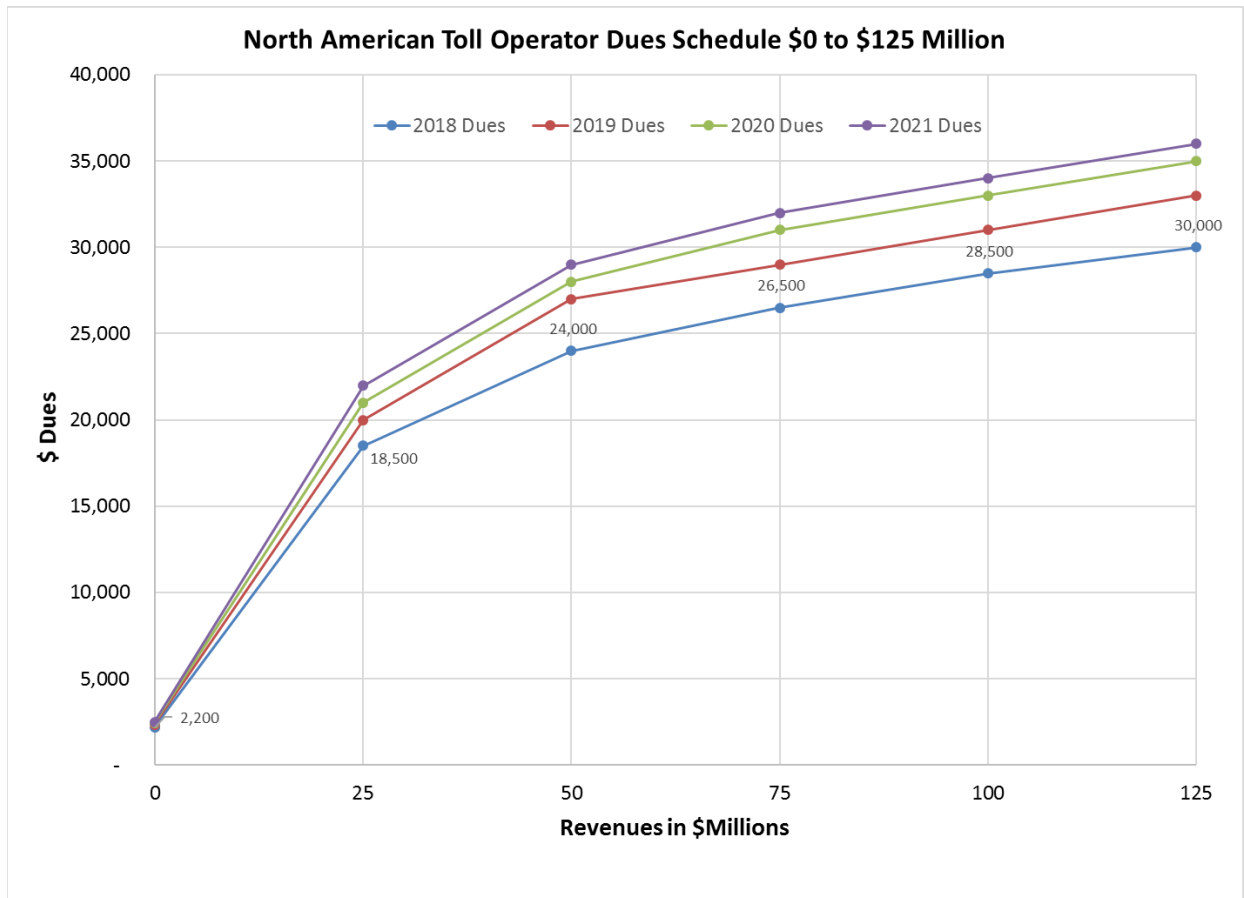
Active North America Toll Revenues in \$Millions	# of members	TOTAL 2018 DUES REVENUE	Average 2018 Dues	2018 Dues	2019 Dues	2020 Dues	2021 Dues	18 to '19 increase	19 to '20 increase	20 to '21 increase
0 \$	10	\$ 2,200	\$ 2,200	\$ 2,200	\$ 2,350	\$ 2,440	\$ 2,500	7%	4%	2%
25 \$	21	\$ 18,500	\$ 11,121	\$ 18,500	\$ 20,300	\$ 21,300	\$ 22,000	10%	5%	3%
50 \$	5	\$ 24,000	\$ 22,542	\$ 24,000	\$ 26,500	\$ 28,000	\$ 29,000	10%	6%	4%
75 \$	4	\$ 26,500	\$ 24,450	\$ 26,500	\$ 29,300	\$ 30,900	\$ 32,000	11%	5%	4%
100 \$	4	\$ 28,500	\$ 27,122	\$ 28,500	\$ 31,300	\$ 32,900	\$ 34,000	10%	5%	3%
125 \$	3	\$ 30,000	\$ 29,224	\$ 30,000	\$ 33,000	\$ 34,800	\$ 36,000	10%	5%	3%
300 \$	11	\$ 35,000	\$ 31,520	\$ 35,000	\$ 40,500	\$ 43,800	\$ 46,000	16%	8%	5%
700 \$	7	\$ 35,000	\$ 35,000	\$ 35,000	\$ 42,000	\$ 46,200	\$ 49,000	20%	10%	6%
1500 \$	5	\$ 35,000	\$ 35,000	\$ 35,000	\$ 45,500	\$ 51,800	\$ 56,000	30%	14%	8%
2000 \$	3	\$ 35,000	\$ 35,000	\$ 35,000	\$ 47,500	\$ 55,000	\$ 60,000	36%	16%	9%
Active Non N.A. Group	11	\$ 17,500	\$ 14,150	\$ 17,500	\$ 19,300	\$ 20,300	\$ 21,000	10%	5%	3%
	4	\$ 25,000	\$ 25,000	\$ 25,000	\$ 27,500	\$ 29,000	\$ 30,000	10%	5%	3%
Small Assoc	65	\$ 2,500	\$ 2,385	\$ 2,500	\$ 2,800	\$ 2,900	\$ 3,000	12%	4%	3%
Med Assoc	30	\$ 8,000	\$ 8,000	\$ 8,000	\$ 9,200	\$ 9,920	\$ 10,400	15%	8%	5%
Sustaining	35	\$ 15,000	\$ 15,000	\$ 15,000	\$ 18,000	\$ 19,800	\$ 21,000	20%	10%	6%
DBE	23	\$ 995	\$ 973	\$ 995	\$ 995	\$ 995	\$ 995	0%	0%	0%
	\$ 241	\$ 2,731,980								
		Active N.A.		Total Dues Revenue 2018	Total Dues Revenue 2019	Total Dues Revenue 2020	Total Dues Revenue 2021			
		Active Non N.A.		\$ 1,533,937	\$ 1,793,145	\$ 1,947,060	\$ 2,050,341			
		Group		\$ 155,655	\$ 171,600	\$ 180,400	\$ 187,000			
		Small Assoc		\$ 100,000	\$ 110,000	\$ 116,000	\$ 120,000			
		Med Assoc		\$ 155,000	\$ 173,600	\$ 179,800	\$ 186,000			
		Sustaining		\$ 240,000	\$ 276,000	\$ 297,600	\$ 312,000			
		DBE		\$ 525,000	\$ 630,000	\$ 693,000	\$ 735,000			
				\$ 22,388	\$ 22,388	\$ 22,388	\$ 22,388			
				\$ 2,731,980	\$ 3,176,733	\$ 3,436,248	\$ 3,612,728			
					2019	2020	2021			
		Percent dues increase for smallest agency member			7%	4%	2%			
		Percent dues increase for median agency member			11%	5%	4%			
		Percent dues increase for 3 largest agency members			36%	16%	9%			



## APPENDIX 4: Proposed Dues Structure, North American Toll Operators (\$0 to \$125 Million)

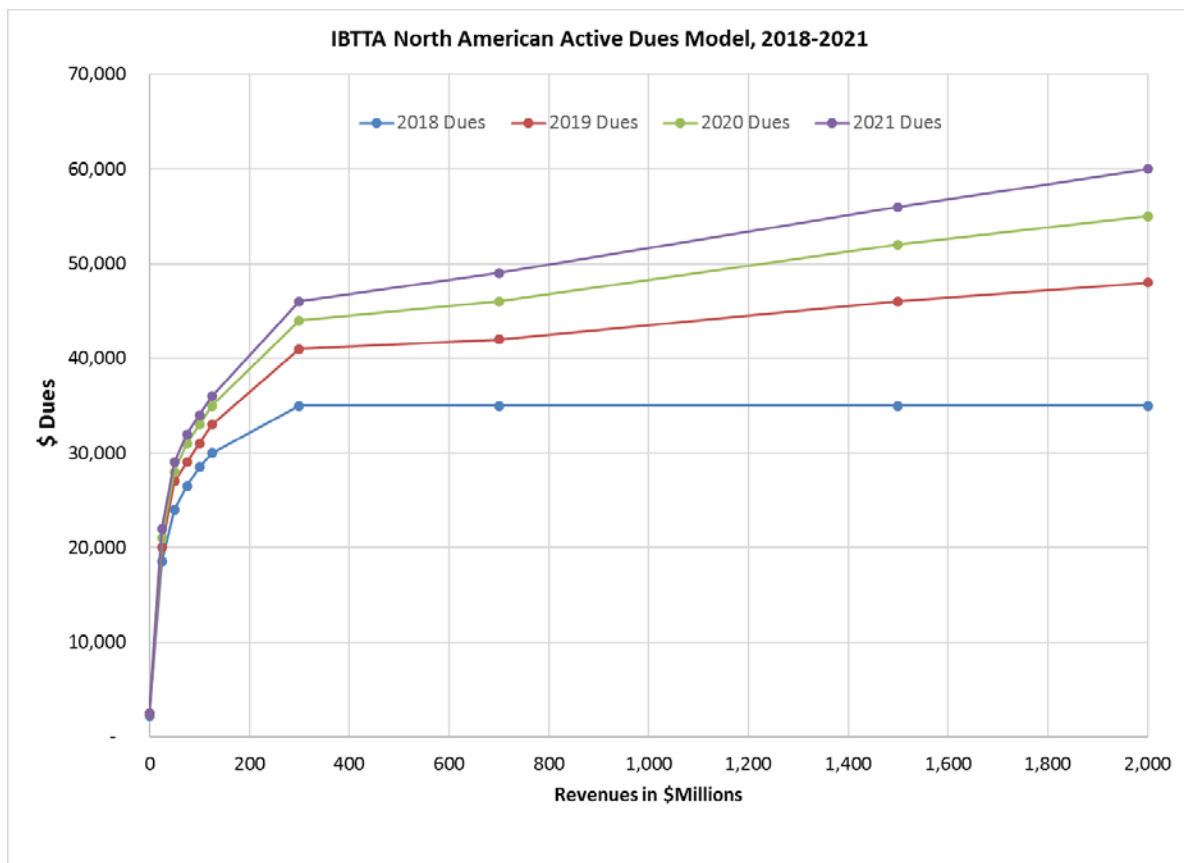
This chart illustrates the current and proposed future dues structure for North American Active (Toll Operator) Members. We show this level of detail here because the North American toll operator members account for nearly 60% of all IBTTA dues revenue.

The blue line towards the bottom of the chart is the current dues structure. The other lines show proposed dues levels for 2019-2021. To show more detail, this chart includes only members with toll revenues between zero and \$125 million. The next chart shows the dues structure continuing above \$125 million in toll revenues.



## APPENDIX 5: Proposed Dues Structure, North American Toll Operators (\$125 Million to \$2 Billion)

This chart illustrates the current and proposed future dues structure for North American Toll Operator Members with revenues between 0 dollars and \$2 billion. The blue line towards the bottom of the chart is the current dues structure. Notice that the information from the previous chart – toll revenues between 0 dollars and \$125 million – is compressed into the left side of this chart. Also notice in the current dues structure – the blue line at the bottom – dues are capped above \$300 million in toll revenues. The proposed new dues structure would increase the dues for the 15 toll agencies that currently have more than \$300 million in toll revenues.



## **APPENDIX 6: BIGGEST CHANGES YOU'VE OBSERVED SINCE YOU JOINED THE INDUSTRY**

Exercise conducted during the IBTTA Conference Planning Meeting, July 22, 2018

1. ETC
2. More women
3. Tolling in the news
4. Managed lanes
5. Shared vehicle services
6. AET / Coin toll booths
7. Toll is not a 4-letter word
8. Managed lanes
9. Use of data
10. From a focus on road infrastructure to a focus on mobility services
11. AET and human interaction with customers
12. Congestion management
13. How transportation is funded
14. From finance to mobility providers
15. Evolution of customer experience
16. P3 tolling to implementing projects quicker
17. Conversion to AET and use of managed lanes
18. Customer first operational attitude
19. Technology and materials in roads and bridges
20. Cash was interoperability; now ETC is interoperable
21. Move to AET in some areas; move backwards and away from AET in other places
22. Increasing collaboration in transportation and tolling
23. Manual tolling to AET
24. How we've used technology for tolling as a mobility service
25. More collaboration and fewer silos; toll operators are working with DOTs
26. Use of technology
27. Diversity in the workforce
28. People see the benefits of tolls including reliability
29. Tolling is a meaningful solution to transportation
30. From inward to outward

## **APPENDIX 7: KEY ISSUES ON THE MINDS OF IBTTA BOARD MEMBERS**

In late November and early December 2017, we spoke by phone with most of our 2018 board members. The goal was simple: check in with each person to see how they were doing and learn about the issues that are top of mind with respect to their operations and IBTTA. Below is a summary of the major issues and themes covered in the calls. Quotation marks indicate a direct quote or a close paraphrase of what someone said.

### **Deeper peer to peer networking beyond formal meetings**

- “Peer to peer interaction is key. We need to make sure we have other channels of communication open to our peers in the industry. We have subject matter experts in different disciplines in our organization, but a lot gets lost. How do we add to what we’re currently doing to get higher levels of communication among other agency staff?”
- “There is tremendous value in the network of people who are consistently there at meetings. How do you reach deeper into organizations to include more people at meetings?”
- “How do we better facilitate conversations among peer groups of people in agencies?”
- “How do we engage more people on a peer to peer level within IBTTA?”
- “How do we share best practices and failures; could we do a peer exchange as has been done in AASHTO?”

### **Public Private Partnerships**

- “How do we make less feasible projects more feasible?”
- “There have been a number of valuable public private partnership projects in the works, but politicians have been struggling to jump over the hurdles to bring them to completion. From inception to revenue stream is a long time. State government officials are already backing up from projects that we thought long ago would be successful. I’d like to hear how other states have gotten across the line on newer projects.”

### **Revenue protection**

- “What is the cycle for educating agency board members about the world of electronic toll collection.”
- “We need more effective reciprocity of violation enforcement across state lines.”
- “We don’t want to publicly expose the underbelly of revenue leakage.”

### **Let’s get practical!**

- “We keep covering the same topics in the same way at these meetings. Someone talks about an emerging challenge that we need to prepare for without providing a practical, real world action or solution to address it. We need to hear more about the practical aspects of things that are being done.”
- “How do we present value to members who cannot make it to meetings?”

### **Connected and Autonomous Vehicles**

- “What’s our role? Disseminating information, advancing a policy, or developing technologies? What are the consequences for tolling and managed lanes in 10 years?”
- “Road operators have not been fully invited into the discussion of CAVs.”

### **Digitalization of information.**

- “This is a hot topic. Introducing new means of payment. If we don’t reflect on this, other industries like telecom will do it for us. It will be a hurricane for the whole world of transportation. Are we prepared just to be in charge of the maintenance of assets?”

### **Opponents and Supporters**

- “Our legislature is anti-toll.”
- “The most helpful thing for me is public acceptance of tolling.”

## **APPENDIX 8: MAJOR ACCOMPLISHMENTS 2013-2017**

### **Communications**

- Launched and sustained a very successful communications campaign, “Moving America Forward.”
- Built ongoing relationships with national and international media.
- Created several data-rich reports, positioning IBTTA as a credible resource.
- Launched our daily e-newsletter, IBTTA SmartBrief
- Relaunched our Tolling Points blog.
- Build a vibrant and robust social media presence on Facebook, Twitter, LinkedIn, and Instagram.
- Created a standalone Communications Workshop.

### **Advocacy and Thought Leadership**

- Strengthened public policies that support tolling through the FAST Act.
- Held a landmark Transportation Visioning Summit with the leaders of 18 key transportation associations and continued to nurture the relationships we built there.
- Reached consensus on how to achieve nationwide interoperability of electronic toll collection.
- Established the Platinum Sponsor Advisory Council as a future looking think tank for the association and industry.
- Launched a Connected and Automated Vehicle Working Group, a vital forum for sharing knowledge and ideas.

### **Meetings and Member Service**

- Launched the Innovation TECH Talks, one of the most popular and creative features of our successful technology workshops.
- Established the Membership Committee and hired new staff, which resulted in a significant increase in membership, sponsorship, and exhibits.
- Created TollMiner, our powerhouse of toll industry data, which is still new and has great potential to serve our industry.
- Created a Scholarship Program to help support undergraduate students pursuing transportation-related degrees.

## **Deliverables as Part of IBTTA Three-Year Plan**

Revised October 26, 2018

With Progress Updates on May 9, 2019 and July 19, 2019

(Text in **BLUE** signifies work that is being done to achieve the outcomes written in **BLACK**.)

During the October 13, 2018 Board meeting, the IBTTA Board adopted this resolution on the three-year plan:

*Resolved that the IBTTA board adopt the three-year plan as presented and instruct staff and the finance committee to prepare a detailed 2019 budget and implementation plan based on the structure outlined in the three-year plan. Be it further resolved that budgets for 2020 and 2021 will be approved (not now but later) in the normal course of the board's action in 2019 and 2020.*

In response to the Board's adoption of the 3-year plan, the IBTTA Executive Committee and staff developed the following deliverables, including a measure of success in parentheses at the end of each item. Some items lack a specific quantifiable measure of success either because it is self-evident or a good measure cannot be identified now. We recognize it's better to have a crude measure of the right thing than a specific measure of the wrong thing.

**OUTCOME 1: STRENGTHENING CURRENT PROGRAMS AND SERVICES.** These include meetings, advocacy, and communications.

Deliverables:

1. **Speakers with New Perspective.** Reach beyond traditional industry speakers to include new voices from academia, think tanks, local governments, the technology and mobility community, environmentalists, and others in 2019 meetings. (20% increase in this type of speaker vs 2018.
  - a. This was a priority for the Orlando Technology Summit (March 2019) planners and feedback from our post-Workshop survey reflected many comments about the number of outside speakers and new thinkers that they heard throughout the Summit. This is one of the overall objectives for all meeting planners.
  - b. IBTTA's Communication and Change Management Summit's Meeting Planning Group has planned a diverse set of speakers from inside and outside the tolling industry, entry level to executive level speakers, a mix of ethnic background and 55 percent of the speakers are women. IBTTA is partnering with the WTS Puget Sound Chapter for the Summit in Seattle.

2. **International Speakers.** Increase International participation in IBTTA meetings and in meeting planning groups to include non-US based speakers with relevance across the industry. (20% increase in this type of speaker vs. 2018).
  - a. The newly constituted International Committee is working to expand potential speakers for all Workshops.
  - b. The MaaS track during the Orlando Technology Summit was hoping to have more international expert speakers but unfortunately, most of them were unable to attend without significant funding and/or stipends. We did have many US-based speakers with knowledge of European MaaS.
  - c. The 2019 Annual Meeting should reflect a larger contingent of non-North American presenters; one of the General Sessions is a large panel of speakers from Around the World reflecting on specific experiences from their countries.
3. **Students.** Encourage members to “sponsor” student attendance at IBTTA technology workshop and annual meeting. (10 students in Orlando; 5 students in Halifax).
  - a. Eight students registered at the discounted rate for the Orlando Technology Summit. Those eight students and many others came to the Backyard Olympics which was a great way to introduce them to the IBTTA community.
4. **Succession.** Encourage members to bring young professionals from their organizations to IBTTA meetings. (Hard to measure because we don’t have a baseline of “young” people now).
  - a. The Orlando Technology Summit brought approximately 25 people to the inaugural meeting of the Young Professionals Council. Tyler Milligan ran the meeting and did the outreach to encourage companies to send new staff. They worked on a Vision and Mission as well as identifying subcommittees and electing Council Leadership.
  - b. Marty Stone and Tom Knuckey ran a Tolling 101 session as part of the preliminary roundtables during the Orlando Technology Summit. It was very well attended and received great marks in the post-Summit survey. This is something that we’d like to continue since it appeals to both young professionals and newbies to the industry.
5. **Collaboration.** Collaborate with other transportation related groups such as TRB, PIARC, AASHTO, ITSA, ASECAP, ITE, ASCE, ITS America and others in putting on meetings and delivering content.



- a. Collaboration activities: Orlando Technology Summit: ATI, TeamFL, TRB, ITS International, PIARC; Finance Summit: TRB Finance Committees. 2019 Maintenance Workshop; no partners yet but working with AMOTIA (asset management association) and many member host agencies in Hampton Roads area. Communications: WTS. Annual Meeting partner is ISCBOA. International Summit of Portugal: ASECAP.
- b. IBTTA worked closely with the organization “Infrastructure Week 2019,” to promote Infrastructure Week, May 13-20, 2019, highlighting the benefits of tolling and transportation. One example was an audio podcast focusing on IBTTA Member, WSDOT’s new SR-99 Tunnel.

**OUTCOME 2: DATA AND ANALYSIS.** A fully mature **TollMiner** data collection and visualization product with key information on every toll facility and operator in the world.

Deliverables:

1. **New Releases and Use Cases.** TollMiner will have 2 new releases per year focused on functionality prioritized by member use cases. Identify the use cases and the required data that will help toll operators solve real business problems that help them save money, make money, or increase value to their customers and stakeholders. (Identify three specific data points to be added by June and three more data points to be added by December.)
  - a. Releases: In June 2019, we released TollMiner 3.0. It added 2018 traffic and revenue (T&R) data and updated 2017 T&R numbers, along with a re-designed database. Also, as new facilities start tolling, they are continually added to the tool.
  - b. Agency Attributes to address use cases: We are working with the TollMiner Working Group to identify agency attributes that are the most relevant to collect and display in TollMiner. These will allow a user to apply filters to identify agencies that have these attributes. Attributes span technology, operations, violation processing, and infrastructure, and will be included in a 2019 release of the tool.
2. **International Data.** Expand international representation by partnering with ASECAP to explore the commonalities between US data and ASECAP member data and adding ASECAP data where commonalities exist. (Add data from 6 non-US based toll operators or associations of toll operators).

- a. TollMiner was discussed during the May 2019 International Committee meeting. Committee members understand the value of having their data in TollMiner and will be working with IBTTA to provide their information in a readable format. For now, TollMiner contains the facilities, operators, and centerline miles that are part of ASECAP, but does not have additional data including toll collection/pricing methods or T&R data. Maria Moreno from SEOPAN has provided more detailed information on roads operated by Roadis in India, Brazil, Portugal, Mexico, and Spain, so we are making some progress.
3. **Staff.** Hire, train, and leverage the skills of a research specialist (new staff member) who can explore alternate data sources and help with industry normalization of terminology.
  - a. In April 2019, we hired Lisa Jewell as a Research Specialist. Lisa has a MS degree in Library Sciences. She's jumped into working on TollMiner with interest and focus and is showing great promise as a new member of our team.
4. **Member Validation.** Members are confused about some data questions we pose because some terms (e.g. ORT, AET, priced managed lane) mean different things to different people. In 2019, we will work with members to adopt a process to normalize definitions of terms to reduce confusion and improve data validation efforts.
  - a. Data Validation. We have built a new Agency Validation interface that allows data to be edited in place and submitted to IBTTA. Once approved by IBTTA, the data is then pushed to the live TollMiner Tool. The new interface is easier to use and allows IBTTA to track the date that an agency approved their data. TollMiner will be adjusted this year to allow a user to visually identify which agencies have validated their data.

**OUTCOME 3: KNOWLEDGE TRANSFER.** Developing a more systematic way of capturing the knowledge that resides in the minds of individual experts and practitioners in the IBTTA community and making that knowledge more accessible to all members.

Deliverables:

1. **Agency Peer Exchange Pilot Program.** Track and report out on progress being made under the new agency Peer Exchange Pilot Program. Establish guidelines that will be used to support 2020 participants. Also look at ways this could be linked to a similar ASECAP initiative.
  - a. John Keller made a presentation on this topic during the spring Board meeting in Philadelphia in May 2019.

2. **Group Briefings and “Webinars.”** Create one or more methods beyond in-person meetings in which executive directors (or people in other disciplines) can carry on a conversation about a specific topic without having to be in the same physical location. Deliver webinar-like programs to promote member sharing and information exchange with the specific intention of serving those with limited travel ability, including non-US members. Specifically, do a bi-monthly group briefing or conversation via skype or other technology platform. (Conduct 3-4 executive director briefing sessions and a combined total of 6 webinar-like programs and group conversations).
  - a. In April 2019, we opened a Gaggle email discussion group for executive directors and their equivalents at member agencies and concessionaires with some initial discussion on violation enforcement and related issues. Other recent topics have focused on toll leakage and cross state reciprocity, advancing roadway automation readiness, and commercial truck fleet loyalty and discount programs.
  - b. The International Committee held a Webinar on Managed Lanes on June 18, 2019. Three agency speakers presented their managed lanes models and messaging as examples to emulate at facilities operating in the US and outside of North America. 246 individuals registered for the webinar and 163 attended the live session.
  - c. We are planning a second International Committee webinar on drone usage in October 2019.
  - d. On July 17, 2019, the Council of Platinum Sponsors hosted a webinar to discuss the Department of Homeland Security Cybersecurity Framework for Transportation. The webinar was presented by Mark Cantelli, Vice President, Conduent Transportation, and Frank Reid, Senior Cybersecurity Consultant at AECOM.
3. **Document Library.** Work with members to create a Document Library with identified categories that will be populated with a representative sample of materials in each category from across the membership. Establish a permanent curator and naming conventions for documents with indexing. Access will be granted within member organizations at the subject matter expert level. In 2019, sample RFPs and RFQs will reside in the Document Library. The Document Library will be housed on the website as a member-only benefit. The next category of document samples will include policy documents or org charts and job descriptions, based on 2018-2019 member survey results.

- a. The Membership Committee launched the “IBTTA Exchange” also known as the Document Exchange. 197 Documents have been added by members. Categories include Job Descriptions, Organization Charts, Design Specs, Call Center Operations, and Policies. Instead of developing a proprietary software, we are using Box.com to launch this new product. The Committee will continue to gauge the success and work on improvements throughout the year.
- b. Round two of the “Master Procurement Calendar” has been published to include procurements through 2021. The team is actively working to identify Procurement Contacts all at member agencies and add their procurement plans to the calendar.

**OUTCOME 4: INDUSTRY VISION.** Integrating our industry more appropriately into the fabric of the larger transportation community.

Deliverables:

1. **Fly In.** Hold Washington, DC fly-in to Congress and the Administration in 2019 to advance the tolling agenda.
  - a. Occurred February 27-28, 2019 with 20 participants (including staff). We attended a portion of the AASHTO Washington briefing and had sit-down briefings with staff of the Senate Environment & Public Works Committee and House Committee on Transportation & Infrastructure.
2. **IBTTA Policy Proposal on Reauthorization.** Working through the committee structure of IBTTA, develop a comprehensive and concise industry policy proposal in areas of funding, technology, etc. to advance our industry’s position on transportation reauthorization in Congress. Hire technical subject matter expert (outside consultant).
  - a. This is a work in progress. The timetable of reauthorization is uncertain, but we are working on drafting policy position through the Government Affairs Committee.
3. **State Advocacy (SWAT – Take it to the States).** Establish tangible efforts in 3-4 states identified by the Government Affairs Committee to organize members involved in the state to communicate our coordinated message, to educate and build relationships with state and congressional officials and legislative committees focused on transportation in the state legislature, placing op-ed pieces, doing local television appearances, and building social media efforts in the targeted states. (Measurable efforts in 3 states).

- a. Government Affairs Committee has repeatedly discussed this effort and have been working with FHWA staff seeking opportunities to assist any states applying for the ISRRPP program. The sense of the GA Committee and staff is that other opportunities for advancing tolling may bear more fruit.
  - b. Officials from Connecticut reached out to IBTTA for assistance and Pat Jones testified to the state legislature in support of the Governor's proposal to re-institute tolling. Other efforts have included meeting with Governor Lamont, writing and publishing op eds, and serving as a resource to supportive local organizations.
  - c. IBTTA staff have worked with MTA Bridges & Tunnels to convene an "industry day" in support of sharing ideas to advance cordon-based pricing.
  - d. IBTTA continues to educate and inform members of the media on the benefits of tolling, new efforts on congestion pricing and mobility.
4. **Preparation for disruptive technology.** Working through the committee structure of IBTTA, develop 1 year, 3 year and 5 year deliverables for the industry at large in the broader areas of MaaS, RUC, CAV, Hyperloop, Blockchain, artificial intelligence and how our industry fits in. We will also determine the roll of the toll agency in these efforts. The effort culminates in an Innovation Summit hosted by agency Chief Technology Officers within the agencies including non-US CTOs. (Innovation Summit to be held after 2019).
- a. Emerging Technologies Committee has been created and several new subgroups have been established: Big Data, Drones, Innovation & Strategy role within an agency, and Tolling and customer management. The groups have all held initial formation meetings and are working to develop white papers for Board consideration in early 2020. Existing Toll Miner and Connected & Automated Vehicles (CAV) Working Groups are also meeting and engaging on a regular basis.
5. **Joint Policy Resolution.** Develop a joint policy resolution focused on disruptive technology with other transportation associations and organizations such as TRB, ARTBA, ASCE, AASHTO, ITSA. (Multi-year activity).