

# Road Charge Pilot Project Independent Evaluation

## *Evaluation Plan*

Presented To:

California Road Charge Technical Advisory Committee

March 18, 2016



# The Evaluation Team



- Project management and technology firm
- Headquartered in Denver, CO ; Offices throughout California
- SAC office will be the center for all work
- 25,000+ employees; \$5.4B in annual revenue

*-Project Management  
-Technical Evaluation  
-Report Writing  
-Interviews*



- Public outreach, research, and data analysis firm
- Offices in Oakland, Seattle, and Columbus
- Deep experience in conducting public outreach throughout California: SFMTA, Samtrans, Alameda and Contra Costa Counties, and SCAG

*-Surveys  
-Focus Groups  
-Opinion Data Analysis*



- Transportation consulting and data analysis California registered SBE
- Offices in San Francisco and Los Angeles
- Led many major data analysis programs throughout California

*-Trend Analysis  
-Data Modeling  
-Reporting*



- Transportation policy and engineering California registered SBE/DVBE/MBE
- Offices in Sun City, Redland, and Riverside
- Traffic operations, policy studies, data analysis, and engineering support throughout California

*-Operational Interviews  
-Financial Analysis*

# Report Types & Characteristics

- Four Different Reports:
  - Public outreach
  - Focus group
  - Pilot delivery team interviews
  - Data analysis & results
- Each Report will Include:
  - Legislative briefing
  - Executive summary report
  - Identification of key results & trends
  - Results linked to specific performance objectives
  - Infographics used to the fullest extent
- All Reports will Map to TAC Recommended Evaluation Criteria and Senate Bill 1077

# Participant Surveys

- Disseminated Electronically via Weblink and Printed via Mail
  - Use unique identifier for each participant (protects PII)
  - Phased (Pre, Mid, and Post-pilot)
  - Trigger-based (Change in account, leaving program, etc.)
  - Survey both Experiential and Attitudinal Measures
- Experiential Measures
  - Specific to pilot experiences
  - Examples: ease of use, customer support, accuracy of “invoices”
- Attitudinal Measures
  - Based on participants’ opinions of road charge
  - Examples: fairness, privacy protection, key concerns
- Conduct Trend Analysis from Pre-pilot Baseline Results

# Focus Groups

- Five Focus Groups (10-12 Participants Each)
  - Conducted at five selected locations (Caltrans/CH2M offices, or offsite locations)
  - Focus group invitees expected to match demographics for larger participant pool
  - May include breakout sessions for each account type or other demographics
- Will Expand on Experiential and Attitudinal Survey Questions
- Types of Questions:
  - Quantitative “closed-end”
  - Expanded
  - Qualitative “open-ended”

# Pilot Delivery Team Interviews

- Three (3) Sets of Seven (7) PDT interviews
  - Phased
  - Trigger-based interviews may also be conducted
  - Involves Caltrans, interagency working group, D'Artagnan, and contracted account managers
  - Both closed-end and open-ended questions
- Questions will Focus on Three Key Areas:
  - Operations
  - Technical
  - Programmatic
- Trend Analysis will be Conducted Over Course of Pilot
- Programmatic and Technical Documents will be Reviewed
  - Prior to interviews
  - Used to shape/refine questions

# Pilot Data Analysis

- Analyze the Pilot Performance Across Several Key Areas:
  - Programmatic
  - Technical
  - Financial
  - Operational
  - Equitability
- Review Available Program Documentation:
  - Pilot design documents and requirements
  - Programmatic documents, reports, TAC briefs, and policies
  - Industry acceptable standards
- Findings will Include:
  - Both qualitative and quantitative analyses
  - Data and performance results mapped against evaluation criteria
  - Identification of root causes for deviations

# Key Project Target Milestone Dates

Milestone	Date
<b>Task 2: Evaluation Planning (February – May 2016)</b>	
Planning Workshop	April 2016
Objectives Traceability Matrix & Pilot Evaluation Plan	May 2016
<b>Task 3: Evaluation Implementation (May 2016 – April 2017)</b>	
Surveys	May – July; Oct. – Nov. 2016 Jan. – Mar. 2017
Focus Groups	Feb. – Mar. 2017
Pilot Delivery Team Interviews	June & Oct. 2016; April 2017
<b>Task 4: Reporting (Mar. 3 – May 15, 2017)</b>	
Evaluation Reports & Briefings	<b>NLT May 9, 2017</b>

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