WASHINGTON STATE ROAD USAGE CHARGE

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D’ARTAGNAN CONSULTING, LLP
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OVERVIEW OF TODAY’S PRESENTATION

- Brief recap of the pilot, and developments since last meeting
- Statewide participation in the pilot test
- Communications plan
- Recruiting volunteers for the pilot test
BRIEF RECAP: ROAD USAGE CHARGE IN WASHINGTON
Basis of the Assessment

- Identify and develop a sustainable, long-term **user-pays revenue source** for Washington State’s transportation system, and **transition from the current gas tax system**.
- Ensure there is **consumer choice** on how mileage information can be collected and paid.
- During the transition period of moving from the gas tax to a road usage charge, drivers would pay one or the other, **but never both**.
- For purposes of comparing the gas tax against a road usage charge, assume revenue neutrality and **compare net revenue potential** for each system.
- Aggressively pursue **federal funding** (get credit for prior state appropriations).
PROGRESSION OF RUC ASSESSMENT

Now completing the Implementation Plan for a Pilot Project in 2017-19

WORK TO DATE
- Foundational Work
  - Prior studies by:
    - Transportation Commission
    - Joint Transportation Committee
    - Connecting Washington Task Force
- 2012: Feasibility Evaluation
  - Feasibility assessment
  - Initial policy evaluation and research
  - Work plan
- 2013: Policy Framework and Business Case Evaluation
  - Policy framework
  - Business case evaluation of illustrative operational concepts
  - Work plan

PROPOSED WORK PLAN
- 2014: Develop Concept of Operations
  - Refine policy framework
  - Develop a single concept of operations
  - Update financial evaluation
- 2015-2017
  - Demonstration
  - Evaluation
  - Public attitude assessment
  - Public communications and engagement

POTENTIAL REFINING WORK
- 2017 and Beyond
  - Reevaluate road usage charge methods based on demonstration
  - Further policy refinement
  - Draft legislation
  - Develop organizational design
  - Develop transition strategy
  - Refine business case
WASHINGTON RUC PILOT PROJECT

Federal funding for:

- Year-long, statewide test of Washington-designed RUC system for up to 2,000 volunteer test vehicles
- Partners: OReGO, City of Surrey, BC, and Seattle Electric Vehicle Association
- Choices: Mileage Permit, Odometer Charge, and Automated Mileage Reporting

Unique features:

- International Interoperability test with British Columbia drivers
- Financial Interoperability test with Oregon
- Feedback specifically from EV drivers
- Smartphone Innovation Challenge to develop new technology or RUC app
- Partnerships with DOL agents and subagents
Volunteers in the pilot test can choose from four options:

- **Mileage Permit**: driver chooses how many miles to purchase
- **Odometer Readings**: per-mile charge based on vehicle odometer
- **Automated Mileage Meter**: in-vehicle device reports miles – drivers choose if they want GPS or not
- **Smart Phone**: app that uses driver’s phone to record and/or report miles driven

**No-tech**  |  **Low-tech**  |  **Higher-tech**  |  **High-tech**
Can IT engineers, software developers and designers create a prototype solution (software or device) to mileage reporting by smartphone?

- Allows drivers to use their own smartphone to record and report mileage.
- Allows drivers to decide whether or when to enable location-based services (GPS).
PILOT PROJECT PARTICIPANTS
PILOT FEATURES RELEVANT TO VOLUNTEER RECRUITING

Key Assumption: pilot is to consist of no more than 2,000 Washington vehicles.
RECOMMENDED REGIONS: OBJECTIVES

- Support the four key pilot features (previous slide)
- Reflect the geographic, economic, and demographic diversity of the state
  - Housing and employment patterns
  - Income
  - Ethnicity
  - Age distributions
- Volunteer recruitment will focus on five regions to ensure a sufficiently large and diverse pool of prospective participants
Leverage pre-existing regional boundaries and communications channels

- MPO
- RTPO
- Legislative districts
- Media market territories
TEST INTERNATIONAL INTEROPERABILITY WITH SURREY, BC

- City of Surrey is a key partner
- Will recruit up to 200 British Columbia residents to participate in test of international interoperability
TEST INTERSTATE INTEROPERABILITY WITH OREGO

- Test technological and financial interoperability with Oregon DOT’s OreGO system
- Oregon DOT is a key partner
  - Will recruit OReGO customers to participate in test of interstate interoperability
Desired participant characteristics:

- Are currently enrolled in OreGO
- Have a GPS-enabled mileage reporting device
- Drive into Washington at least occasionally (preferably on a regular basis)
- Willing to participate in Washington’s pilot (this is critical since the Washington/Oregon component of the pilot will levy “real” payments from participants)

*NOTE:* A large number of OreGO participants is not required since this feature is a proof-of-concept for financial interoperability. All funds sent by OreGO participants to Washington will be refunded at the conclusion of the pilot; funds paid by Washington residents will be “seeded” by the pilot project.
RUC AS AN ALTERNATIVE TO SPECIAL SURCHARGES ON PLUG-IN ELECTRIC VEHICLES

Seattle Electric Vehicle Association (SEVA) is a key partner

- Represent EV owners statewide
- Over 3,000 members
- Have been leaders in EV technology and policy in PNW for over 20 years
PARTNER WITH DOL TO ASSIST IN ADMINISTERING THE ODOMETER CHARGE

Washington Department of Licensing (DOL) is a key partner

- Pilot will utilize DOL’s network of licensing service offices (County Auditors and subagents) to support the manual odometer read option
  - Pilot regions are defined to contain multiple potential support locations
 REPRESENT THE GEOGRAPHIC DIVERSITY OF THE ENTIRE STATE

Total Population

6.9 million
~5.5 million aged 18+
CONCENTRATED AREAS FOR RECRUITING VOLUNTEERS
RECOMMENDED GEOGRAPHIC DISTRIBUTION OF PILOT RECRUITING REGIONS

- **Central Puget Sound.** This region has the majority of the state’s population and will provide perspectives from primarily urban and suburban drivers regarding RUC. It also includes the largest concentration of PEV drivers in the state.

- **Eastern Washington.** This region includes Spokane and the Palouse. Region features a fair amount of cross-border travel to Idaho. It includes a mixture of urban, suburban, and rural residents, and important agricultural communities.

- **Northwest Washington.** Recruiting from this region will include large number of rural residents but will have a special focus on the international interoperability aspects.

- **South-Central Washington.** This region will provide a mixture of urban (Tri-Cities) and rural drivers from surrounding areas.

- **Southwest Washington.** This region will provide a mixture of suburban and rural drivers in a region with a high volume of cross-border travel with Oregon.
PILOT PROJECT
COMMUNICATIONS & MEDIA STRATEGY
• Umbrella document to guide all communications efforts and ensure consistency

• Establishes the communications goals and principles

• Identifies three primary audience types and strategies for each – focuses on the what and the why. Individual work plans will provide more details on the how.
COMMUNICATION GOALS

Inform and educate the public.

Recruit participants into the pilot project from across the state.

Generate broad understanding for the pilot project.

Cultivate balanced and accurate media coverage.

Assess public opinion before and throughout the course of the pilot.
COMMUNICATION PRINCIPLES

• Be consistent and clear.
• Stay proactive.
• Adapt and learn.
• Keep it brief, use visuals.
## Inform and Educate Messages

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>MAIN MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What is a road usage charge?</strong></td>
<td>Pay-per-mile rather than by the gallon to fund roads.</td>
</tr>
<tr>
<td><strong>Why a road usage charge?</strong></td>
<td>As vehicles become more fuel-efficient or use no gasoline, our system of funding roads needs to evolve as well to raise sufficient funds and be more equitable.</td>
</tr>
<tr>
<td><strong>Will this be an additional tax?</strong></td>
<td>No.</td>
</tr>
<tr>
<td><strong>What work has already been done?</strong></td>
<td>Four years of research and policy analysis, with pilot planning now underway.</td>
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</tbody>
</table>
COMMUNICATION PLATFORMS

Digital
- WA RUC Website
- Online Survey
- Email Lists
- Social Media, including video
- Webinars

In-Person
- Focus Groups
- Briefings
- Stakeholder Meetings/Events
- Public Meetings
- Community Events

Print Materials
- Postcards, FAQs, and Posters

Media
- TV, Print, Radio
Commission Staff and Commissioners
Assist with pilot project implementation and serve as the lead state agency on the WA RUC. Executive Director and one or two Commissioners will serve as spokespeople.

Steering Committee Members
Use strategically related to their experience and affiliation. Five members have volunteered to serve as spokespeople.

Consultant Support
Take the lead on various communication platforms. Provide staffing for events, meetings, and focus groups.
MEDIA STRATEGY

- Focus on education and awareness in advance of key decisions/milestones
- Range of spokespeople available, depending on interest and topic
- Clear, concise materials available throughout process
- Coordination with key state offices and elected officials
PARTICIPANT RECRUITMENT
Recruit up to 2,000 vehicles to reflect the geographic diversity of Washington to participate in a test of RUC methods.

- In addition to vehicles from Washington, up to 200 vehicles from Surrey, BC will be invited to participate in the pilot, and approximately 20 from Oregon’s OreGO program.
KEY RECRUITING ACTIVITIES

- Define channels for sharing facts about the pilot project
- Identify key partners in recruitment efforts
- Raise public and stakeholder awareness about the need for a long-term transportation funding solution and that a RUC may be a potential successor to the gas tax
- Provide interested volunteers with basic information that describes what they will be required to do as a participant in the pilot, and when they will need to do it
CONCENTRATED AREAS FOR RECRUITING VOLUNTEERS
RECRUITING FRAMEWORK: INTEREST LIST

Pilot Website Interest List

- Tell Your Friends
- Indicate Interest in Volunteering
- Ask Questions
- Sign up for Newsletters/follow us
RUC Ambassadors: very important component of the pilot recruiting strategy

- In the beginning…
  - RUC “Ambassadors” are drawn from the membership of the Steering Committee, the Commission, and WSDOT

- Throughout Stage 1 (pilot set-up)…
  - Core group of Ambassadors will recruit additional RUC Ambassadors through interaction with partner organizations and one-on-one briefings with key influencers in Washington
THE RECRUITING PIPELINE

Pool → Interest List → Prospects → Qualified

Participants
ASSETS THAT SUPPORT RECRUITING EFFORTS

- Pilot Website and Interest List
- News Releases
- Op-Ed copy
- Interviews with WSTC and Steering Committee members
- Email newsletters
- e-newsletter copy for partners and stakeholders
- Printed media (FAQs, posters, postcards)
- Ambassador Talking Points
- Pilot Twitter account
- PowerPoint presentations
- Paper Interest List
RECRUITING CHANNELS

Recommendation: **develop recruiting “toolkits” targeted to each recruiting channel.** Examples include PowerPoint presentations about the pilot, publication-ready newsletter copy, social media copy, and elevator speeches.

<table>
<thead>
<tr>
<th>Traditional Media</th>
<th>Digital</th>
<th>Stakeholders &amp; Partners</th>
<th>Public Meetings</th>
<th>Briefings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot Website with Interest List</td>
<td>Posters in DOL offices/DOL Spotlight</td>
<td>In-person presentations about pilot and invitation to join the interest list</td>
<td>1-on-1 meetings with key influencers, explaining program, inviting to join, and recruiting as ambassadors</td>
<td></td>
</tr>
<tr>
<td>Partner Email lists and digital media (SEVA, VOW, MPOs/RTPOs, DOL, etc.)</td>
<td>Content for partner newsletters and websites</td>
<td>Account Manager Recruiting and Incentives</td>
<td></td>
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<tr>
<td>Tweets by DOL, WSTC</td>
<td>Presentations to stakeholder and partner meetings/events</td>
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<tr>
<td>Targeted Social Media</td>
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Broad geographic coverage
Fact-based
Always includes link to Website/Interest List
Sign-up form
**UPDATED RECRUITING TIMELINE**

- **Late 2016**: Pilot Phase 0
- **Apr - Jun 2017**: Stakeholder, Partner, and Media Outreach
- **Jul - Sept 2017**: Public Recruitment Effort Begins
- **Oct – Dec 2017**: Participant Selection and Open Enrollment
- **Jan - Feb 2018**: Begin Test Drive
- **Mar – Dec 2018**: Maintenance
## TRADITIONAL MEDIA STREAM

### Phasing
- Carries throughout all pilot phases – see Communications Plan
- Educate and Inform in Stages 0 and 1
- Encourage Interest List Sign-ups in Stage 1
- Update, Encourage, and Influence in Stages 2 and 3

### Target Audience
- General Population in Target Regions
- Broad Geographic Coverage
  - Local newspapers
  - Local television news
  - Local radio

### Assets
- ALWAYS include link to website interest list
- News releases
- Op-Ed copy
- Interviews with members of Steering Committee and WSTC
## DIGITAL MEDIA STREAM

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<tr>
<td><strong>Target Audience</strong></td>
<td>General Population in Target Regions</td>
</tr>
<tr>
<td>• Members of Interest List and Volunteer Pool</td>
<td></td>
</tr>
<tr>
<td>• Partner email lists</td>
<td></td>
</tr>
<tr>
<td>• Specific sub-populations if insufficient interest</td>
<td></td>
</tr>
<tr>
<td>• e.g. PEV drivers, border-region residents</td>
<td></td>
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<tr>
<td><strong>Assets</strong></td>
<td>ALWAYS include link to website interest list</td>
</tr>
<tr>
<td>• Pilot Website with Interest List</td>
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</tr>
<tr>
<td>• Email newsletters and announcements leveraging partner email lists</td>
<td></td>
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<tr>
<td>• Pilot project twitter account</td>
<td></td>
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<tr>
<td>• Audience-specific e-newsletter copy; e.g. for SEVA</td>
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</tr>
<tr>
<td>• Video Interviews with members of Steering Committee and WSTC</td>
<td></td>
</tr>
<tr>
<td>• Targeted social media campaigns to specific subpopulations</td>
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DIGITAL MEDIA STREAM: PILOT WEBSITE

Pilot Website

- Indicate Interest in Volunteering
- Tell Your Friends
- Ask Questions
- Sign up for Newsletters/follow us

Interest List
## Stakeholders & Partners Stream – Washington Volunteers

### Phasing

Stages 0 and 1

### Target Audience

Stakeholder/partner interest groups

- Local Geographic Coverage
- Membership of SEVA, AAA, Chambers of Commerce, ACEC, MPO/RTPs, etc.

### Activities

- Presentations to interest groups (e.g. at breakfast or lunch meetings, workshops, and conferences)
- One-on-one or small group briefings with organization leadership
- Post paper assets in Partner facilities

### Assets

ALWAYS include link to website interest list

- PowerPoint presentations
- News Releases
- Printed handouts (postcards, FAQs, posters, etc.)
STAKEHOLDERS & PARTNERS STREAM

- Announce presentation on partner’s website
- Announce presentation on pilot website
- Prepare and Distribute Local News Release announcing presentation
  - Invite local media
- Give Presentation
  - Circulate paper interest list (and update e-interest list)
  - Distribute paper assets (postcards, FAQs)
- Any media coverage of the event should contain a link to the pilot website
STAKEHOLDERS & PARTNERS STREAM – NON-WASHINGTON VOLUNTEERS

Phasing
Stages 0 and 1

Target Audience
Interoperability Volunteers

- OreGO members who travel to Washington
- Residents of Surrey, BC and Greater Vancouver who travel to Washington

Activities

- Coordination with OReGO staff to identify and invite appropriate motorists
- Support for Surrey, BC staff to recruit motorists

Assets

- ALWAYS include link to website interest list
- PowerPoint presentations
- News Releases
- Printed handouts (postcards, FAQs, posters, etc.)
STAKEHOLDERS & PARTNERS STREAM – NON-WASHINGTON VOLUNTEERS

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PUBLIC MEETINGS STREAM

**Phasing**

Stages 0 and 1

**Target Audience**

- General Public in Target Regions
  - Local Geographic Coverage
  - Citizens, transportation professionals, policy makers

**Activities**

- Make Presentations at Public Meetings
  - Presentations
  - Panel Discussions
  - Information Tables

**Assets**

- ALWAYS include link to website interest list
  - PowerPoint presentations
  - Printed assets (postcards, FAQs)
  - Paper interest list (to add to e-interest list)
PUBLIC MEETINGS STREAM

- Announce presentation on Partner’s Website
- Prepare and Distribute Local News Release announcing presentation
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<td><strong>Target Audience</strong></td>
<td>Policy Makers, Key Influencers</td>
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<tr>
<td>• Local Geographic Coverage</td>
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<tr>
<td>• Legislators, transportation leadership, state agency leaders, media</td>
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<td>• Talking points/Briefing packets</td>
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<td>• PowerPoints for Audience to use should they wish to become ambassadors</td>
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PARTICIPANT INCENTIVES

Possibilities include:

- Value-added services provided by account managers
- “Volunteer of the Month” feature on pilot website
- **Awards upon completion of each milestone.** Examples of milestones include the following:
  - Successfully installing equipment or mobile apps
  - Completing a manual odometer reading
  - Completing a survey or focus group
  - “Paying” an invoice
  - Returning OBDII devices at the end of the pilot
- **Cash compensation for time spent on pilot activities**
- Direct incentives by account managers to enrolled customers
NEXT STEPS
NEXT STEPS: STAGE 1 MILESTONES

- FHWA Funding Decision
- Launch recruiting
- System test period
- Enroll test vehicles
- Drive!

Possible In-Person Steering Committee Meetings
CONTACT INFORMATION

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THANK YOU

www.waroadusagecharge.org