



Tasks 1 & 2 Summary Report

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1. Introduction

The Hawaii Road Usage Charge Demonstration project (HiRUC) constituted a major public and stakeholder outreach effort. Even the technical aspects of the project built toward public-facing demonstrations and interactions to gauge understanding and preferences. The major elements of public involvement and communication included the following:

- ▶ Statewide public opinion research
- ▶ Community meetings
- ▶ Stakeholder engagement
- ▶ Advisory Group engagement
- ▶ Peer exchange workshops

This task summary report presents the overarching plan for communication with the public as set out at the beginning of the project, covering Tasks 1 and 2. It also summarizes each of the above five key elements of public involvement and communication.

2. Planning for Public Communication

This section conveys the communication and outreach plan as set forth at the outset of HiRUC in 2018.

2.1. Situation Summary in 2018

Hawaii's Department of Transportation (HDOT) completed a feasibility study of mileage-based fees and a per-mile road usage in 2016. The reason for the study is a decline in gas taxes as a result of people increasingly driving fuel-efficient and or alternate fuel vehicles. Since the gasoline tax is the single largest revenue source for HDOT, the decrease means less funding for road maintenance, operations, and improvements. As a result of the findings, HDOT is conducting a three-year project to gather information from volunteer drivers to assess how a road usage charge (RUC) system might work in Hawaii to replace the gas tax.

In the automated demonstration phase, roughly 2,000 volunteers will be recruited statewide to participate. Their feedback on a per-mile charge system, RUC, in addition to the feedback from a portion of the up to 1.1 million registered vehicle owners reached in the manual demonstration phase, will inform an assessment as to whether this could work in Hawaii and how it might work. As an island state, Hawaii has a unique set of circumstances that will be considered island by island.

This document is a framework for anticipated communication activities in support of the demonstration project. By its nature, communication about a policy concept such as RUC lacks predictability. Public and stakeholder inputs continually illuminate issues and concerns, while the concept and details of prospective RUC policy and systems themselves evolve. Amid such unpredictability, this document contains overarching goals and objectives, categories of tasks, descriptions of available resources, and initial schedules to orient the communication team and align it with the policy and technical work streams.

This section outlines the current situation and the overall goals and objectives of the communication work stream. The remaining sections cover the following communication task areas:

- ▶ Stakeholder assessment, engagement, and management
- ▶ Public opinion research
- ▶ Media monitoring and engagement
- ▶ Communication tools (messages and materials)
- ▶ Coordination of communication for internal teams: technical, policy, communication

A mix of owned media, earned media and paid media will be recommended to inform the Hawaii community of this pilot, recruit participants and assess what might best work in an island state to solve the serious funding shortage for Hawaii's roads.

2.1.1. Project overview

The largest single source of funds for the state surface transportation system, Hawaii's state gas tax, faces a long-term threat. Likewise, counties face the prospect of declining county gas tax revenues, which fund local transportation. The primary reason for the decline in gas tax revenues is Hawaii drivers' adoption of more fuel-efficient and alternative-fuel vehicles, which require less gas and diesel to travel the same distance. Thus, the state needs an alternative, sustainable funding source to address this threat.



In 2016, HDOT commissioned a feasibility study of RUC as a potential measure to address declining gas tax revenues. The feasibility study confirmed the underlying business case for RUC as a prospective revenue tool, but it also highlighted issues and challenges that emerged in initial conversations with HDOT and its partner state and county agencies. The federal government awarded a grant to Hawaii to research the concept more fully, including a demonstration of various methods of potentially implementing a road usage charge as a means of gathering more comprehensive feedback from Hawaii residents, with the ultimate goal of tailoring a model policy that could be acceptable for Hawaii.

Other states have studied RUC dating to at least 2001, including notably Oregon, Minnesota, California, and Washington. HDOT is also a member of RUC West, a consortium of 14 western state departments of transportation engaged in research on the topic. These early-mover states have explored and addressed many of the confounding policy and technical questions that RUC typically elicits from policy makers and the public, including how to protect motorist privacy, how to collect mileage data in a simple and user-friendly way, and how to efficiently scale a RUC system to address millions of vehicles. Ongoing research on the mainland continues to advance concepts for addressing these and other issues, including how to achieve interoperability among states, how to effectively enforce RUC, and how to transition from today's funding model to a potential future with RUC. The federal government, whose federal gas tax is also impacted by improving vehicle fuel economy, is also interested in the concept of RUC as a potential mechanism for shoring up the federal Highway Trust Fund, and it has funded pilot studies in nearly a dozen states including Hawaii.

HDOT's 2016 feasibility study identified many issues similar to those on the mainland. Elected officials and agency stakeholders raised questions about how RUC impacts equity, especially for residents of remote areas who drive long distances, how to protect privacy, and how to operationalize a system efficiently. They also raised issues unique to the state, including how a RUC system could impact individual financial circumstances, given that Hawaii is already among the highest in the country for annual registration and weight fees.

However, Hawaii's investigation of RUC differs from other states in several ways. First, as an island state, very little out-of-state and inter-state travel exists, reducing the magnitude of importance of that complicating factor. Secondly, Hawaii has an existing program (annual motor vehicle inspections, locally known as safety checks) in which residents provide their vehicles' odometer readings to a state-certified inspector. Finally, Hawaii's climate and environmental policy goals rank among the top in the U.S., including an aim for zero emissions by 2045. If successful, this accelerated path toward zero emissions will render the gas tax obsolete as a road funding mechanism faster than other jurisdictions, necessitating the readiness of potential alternative ways to pay for the state's road system.

To learn more, using its federal grant, HDOT will embark on a multi-year research project including demonstrations of RUC concepts for the public. In the first phase, HDOT will engage with stakeholders and the public statewide through a range of activities described further in this document. The purpose of the engagement is to elicit issues, questions, and concerns about the concept of RUC, while providing information about the project to prepare the public for future phases. These early engagements aim to pave the way for a year-long demonstration via personalized mailers to Hawaii residents with information about their vehicle usage and the impact of RUC on them personally. The mailers will include links to web surveys for recipients to provide direct feedback, including questions and concerns. They will also represent an opportunity to recruit approximately 2,000 participants statewide for the more targeted second phase of demonstration involving advanced technologies for automated mileage reporting. Throughout both demonstrations, HDOT and the project team will continue to collect information from stakeholders, the public, and demonstration participants about their

issues, questions, and concerns, and aim to address them through research, analysis, and customization of RUC concepts and policies for Hawaii's unique characteristics and public sentiments.

The communication work stream will provide continuous support for achieving the collective objectives of the project, including the technical and policy work streams. The activities, resources, and schedules outlined in this document serve as a framework that HDOT and the project team can draw on, using the right activities and tools at the right time and place to elicit comprehensive input and to make constructive, efficient use of the inputs received from those with a stake in the outcome.

2.1.2. Communication Goals and Objectives

The goals of the communication stream evolve from phase to phase. In the initial period, the goals are:

- ▶ Through scientific market research and community outreach, determine Hawaii residents' understanding and feelings about subjects of transportation funding and RUC, as well as misconceptions.
- ▶ Build public awareness of the road funding problem, the pilot project, and opportunities for participating in the conversation and the demonstration.
- ▶ Ensure that stakeholders and the public are informed and included in the process.
- ▶ Provide customized island-specific, and in some cases community-specific educational materials.
- ▶ Engage stakeholders and the public in structured and open dialogue, and identify community leaders and spokespersons to support the research effort.

As the project advances toward launch of the manual demonstration, the aforementioned goals will be reinforced, and two new ones will be advanced:

- ▶ Recruit participants for the demonstration from across the state that represent diverse populations.
- ▶ Outline for stakeholders and the general public how their input has been received by emphasizing the design and policy choices made for the project aligning with public preferences.

As the project advances toward the demonstration phase and into the reporting phase, these are the final goals:

- ▶ Measure change in public understanding and sentiment toward transportation funding and RUC, to the extent possible from the data available.
- ▶ With an eye on sound policy options, communicate issues, concerns, and questions of stakeholders and public to decisionmakers. Address how program options were received during the pilot by participants in the demonstration and the general public.

In other states, communication with the public around RUC have taken diverse approaches, but rarely have been deliberate and pre-planned. In Oregon, for instance, the leader among states on the topic of RUC, Oregon DOT engaged with the public and stakeholders as the agency learned what the issues would be, without a plan in advance containing tools or strategies for success. This approach worked for Oregon because of legislative leadership on the topic that protected the research and allowed the state to navigate the stakeholder environment exploring various policy and system configurations until an acceptable solution emerged. California and Washington both took more pro-active approaches, engaging in public forums, public opinion research, and pro-active media information-sharing. In both cases, this approach yielded neutral-to-positive media coverage of the RUC research projects, and support for the effort from key, involved stakeholders, even as the public remained skeptical.

For Hawaii, the goals differ somewhat. Despite being a smaller state, the key stakeholders are more distributed and community-based. Achieving the early-phase communication goals in Hawaii will require more pro-active stakeholder engagement across all the counties and communities of the state.

In addition to the overarching goals outlined above, communication efforts feature more specific objectives aligned with the various activities to be undertaken. These are described more fully in the remainder of this document. As a preview, the high-level objectives include the following:

- ▶ Balanced and accurate broadcast and print media coverage and other communication statewide about the funding problem, the project and opportunities for public involvement.
- ▶ Broad and accurate understanding of transportation funding, RUC, and the demonstration project among target audiences.
- ▶ Recruitment, screening, and enrollment of approximately 2,000 participants for the pilot project.
- ▶ Enable leveraging of opportunities (e.g., community events and earned media) to educate the public about RUC and encourage participation in demonstration project
- ▶ Address myths and concerns about RUC using facts and audience-appropriate communication media and styles.

2.1.3. Project Phases

The project itself is divided into six phases (see calendar below), that are roughly sequential. For purposes of the communication plan, we define six sequential phases, to align with the six project tasks, as follows.

- ▶ **Policy design.** This phase spans the entire project, but for purposes of communication the focus will be on the launch phase, roughly defined as September-December 2018. Communication activities in this phase will focus on establishing baseline messages, branding, and a project website and help line; identification, assessment, and initial outreach to stakeholders; baseline public opinion research; initial engagements with print and broadcast media.
- ▶ **Manual demonstration setup.** This period covers the manual demonstration setup, which begins in September 2018 and continues until the launch of the first pre-invoice postcard mailers, expected roughly Summer 2019, but subject to determination of both technical and communication readiness. The communication activities in this phase will largely be a continuation of the activities in the launch phase, but, having established connections, will involve more interactive dialogue with stakeholders and the media. The focus will be on taking in information to shape the design of the manual demonstration (including messages and precise contents) and preparing key stakeholders and communities for the launch of the manual demonstration. This will require coordination with the technical team to ensure the information taken in is appropriately captured and addressed in the technical design of the pilot. Activities include continued outreach and engagement, and a pre-launch workshop.
- ▶ **Manual demonstration operations.** This period corresponds with the manual demonstration itself, when the project team will generate and send mailers to residents of the state. The communication focus during this phase will be on answering questions from the public, stakeholders, and the media; taking in issues and concerns; and distilling key issues for further research and analysis by the policy and technical teams. In addition, the communication team will take in feedback to help guide any refinements to the manual demonstration mailers.

- ▶ Automated demonstration setup. The setup of the automated demonstration corresponds with the manual demonstration operations. Communication activities will focus on recruitment of volunteers for the opt-in technology demonstrations.
- ▶ Automated demonstration operations. This phase corresponds with the live trial of automated technologies, and overlaps with the latter part of the manual demonstration. The communication focus during this phase will be on answering questions from the public, stakeholders, and the media; taking in issues and concerns; and distilling key issues for further research and analysis by the policy and technical teams.
- ▶ Reporting. During the reporting phase, the communication activities will focus on continued engagement with stakeholders, the public, and media to address questions and concerns. An end-of-project workshop will take place during this phase. In addition, the communication team will provide input, guidance, and quality assurance on the design and content of the final project documents delivered to decision makers and made available for public consumption.

The list below encapsulates major communication-related milestones:

- ▶ Project launch press release and fall-out
- ▶ Focus groups report
- ▶ Advisory committee inaugural meeting
- ▶ Telephone surveys report
- ▶ Town-hall meetings
- ▶ Small-scale manual demonstration pre-operational test run
- ▶ Launch of manual demonstration
- ▶ Identify 4,000 volunteers for automated pilot participation
- ▶ Enroll 2,000 volunteers for automated pilot operations
- ▶ Final report

2.1.4. Task Areas of the Communication Work Stream

In addition to six phases, there are communication task areas (described below and the subject of the remaining sections of this document).

- ▶ Messages and materials. Develop, maintain, and refine a kit of messages, content (including infographics), and documents for deployment to various audiences. This includes anchor communication tools such as the pilot website serving as an official repository for public communication.
- ▶ Direct engagement. Identify, assess and engage with stakeholders through a variety of mechanisms including one-on-one, in groups, through town-hall meetings, within HDOT and partner agencies, and through the advisory committee.
- ▶ Media relations. Monitor and engage with local print, broadcast and online media.
- ▶ Public opinion research. Scientific market research to gauge public opinions about transportation funding and RUC statewide to elicit questions, issues and concerns at the outset of the project.

Table 1 summarizes the basic orientation of communication activity in each phase.

Table 1: Phases of Communication Activities

PHASE	MESSAGE AND MATERIALS	DIRECT ENGAGEMENT	MEDIA	PUBLIC OPINION RESEARCH
Policy Design (launch period)	Orient	Elicit from Tier 1 audiences ¹	Explain	Prepare, understand, and adjust
Manual Demo Setup	Prepare	Elicit from all audiences	Inform	Prepare, understand, and adjust
Manual Demo Ops	Engage	Engage, respond	Inform	N/A
Automated Demo Setup	Recruit	Enlist	Amplify	N/A
Automated Demo Ops	Engage	Engage, respond	Inform	Evaluate participant views
Final Report	Report	Report	Report	N/A

2.2. Messages and Materials

2.2.1. Messages

This refers to the content of communication emanating from the project. The content will evolve over time, and will be customized for each of the islands based on their unique landscape as it relates to road usage charge scenarios. Messaging evolves with the phases of the demonstration:

- ▶ **Launch period.** The focus is around project orientation. This means orienting the project team and its spokespeople to use agreed voice, content and protocols. In addition, the focus of the content itself is around orienting key stakeholders, the public, and the media around the context for the project, the problem that motivated it, and its overall objectives, with an emphasis on opportunities for participation and engagement.
- ▶ **Manual demonstration setup.** The focus is to prepare the public for the demonstration project. Although the activities will focus on listening, the materials that accompany the listening must be clear, direct and accurate in explaining the purpose and intention of the demonstration project, inviting feedback and helping the public to understand their role in both shaping the manual demonstration and then taking part in it.
- ▶ **Manual demonstration operations.** Once the manual demonstration launches, the communication messages will center on direct engagement with the thousands of residents receiving mailers at any given time. Aside from the mailer itself, which will be the subject of intensive design and testing, the communication through elected officials, stakeholders, the media, and the inquiring public will focus on providing answers to questions and resources for addressing their concerns. Feedback may result in ongoing refinements to the manual demonstration mailers.
- ▶ **Automated demonstration setup.** During this period, there will be an additional focus on recruiting participants for the automated demonstration.

¹ Tier 1 audiences include state elected officials and agency officials at HDOT (including branch and district engineers), DBEDT, DOTAX, and other agencies to be identified. Refer to the stakeholder matrix for more details.

- ▶ Automated demonstration operations. The messaging during this phase will be similar in nature and purpose to the manual demonstration operations phase.
- ▶ Final report. In addition to continuing to answer public and stakeholder concerns, the project team will shift communication during this phase to reporting its findings from the research to all the audiences engaged throughout the project and answering questions about the project.

2.2.2. Materials

The kit of materials available to disseminate will also evolve over time, but in general consist of the following:

- ▶ Press materials. A comprehensive media kit will be developed, updated as appropriate through the phases of the project.
- ▶ General one-pager. A one-pager serves as a “leave-behind” flyer that can be left at one-on-one meetings with stakeholders and media as well as used for general audiences. It provides a simple, high-level overview of the project purpose, activities, and upcoming opportunities for engagement. As the project advances, it will evolve to include snapshots on project progress and next steps.
- ▶ Internal messaging suite. This is the script for the project. It will be updated throughout the pilot. It is the guiding document for how to communicate. This document establishes the key points for spokespersons for interactions with elected officials, stakeholders, media and the general public, including FAQ. Key points can be tailored for each audience for maximum understanding. There is a style guide associated with key messages that should be used for proper use of terms, AP Style preferences (for press materials), and HDOT language guidelines.
- ▶ FAQ. FAQ will be maintained and refined throughout the life of the project. The first version aims at the project team, HDOT staff, and project spokespersons. It offers more detailed answers to a wider array of prospective questions. The second version will be modified for public posting on the project website and distribution via direct engagements, written in a more conversational tone for a lay audience.
- ▶ Website. This is the anchor communication tool for the Hawaii road usage charge pilot. It will be a repository for all public facing communication including information about road funding in Hawaii, road usage charge systems, how to participate in the pilot and other key updates. Residents can opt-in through the website to receive e-newsletters with updates throughout the phases of the demonstration.
- ▶ Basic presentation deck and script. The project team will maintain, update, and refine a baseline presentation about the project describing the context, project purpose, project activities, its importance to the state, the issues it aims to explore, and engagement opportunities. The presentation can be tailored for each audience where it is used, including in public meetings, with stakeholders, at editorial board meetings, and in internal agency informational sessions. Accompanying the deck will be a script outlining the basic story it tells for verbal communication with slides.
- ▶ Photography and graphics library. This will consist of approved images for the duration of project drawing on any HDOT stock images as well as commercially available stock as needed and images of public engagement activities and other relevant project imagery. Infographics illustrating complex issues throughout the project will be a part of this project resource library. There will be a style guide developed for standard colors, fonts, images to guide the creation of all communication tools.

- ▶ Videography. Short videos and animation may be used subject to budget availability to build awareness, educate the public on the project and why it is happening, for dissemination via social media.
- ▶ Advertising/PSAs. The project team will consider advertising at the right moment, especially for awareness of the manual demonstration launch and recruitment of the automated demonstration volunteers. Options include digital, display, and broadcast. Digital social media advertising proved most effective for recruitment of volunteers in Washington state.
- ▶ E-newsletter. There will be two: one for stakeholders and people who opt-in for information about the RUC pilot (i.e., from the website), and another for participants in the pilot. The project team will use MailChimp as the email list management software for individuals who express interest in being part of the program. From time to time, thanks to their special interest and active engagement, these individuals should receive updates from the project.
- ▶ HDOT internal newsletters. When appropriate, the project team will coordinate with the PAO to make use of HDOT's internal newsletter (email) capability to communicate critical messages about the project to HDOT staff.
- ▶ Briefings. The project team will author fact-based briefs that can be used to flesh out talking points and communications tools. They can also be used to create content for news stories, commentaries and op-eds. Briefings will evolve over time and likely include an initial briefing, a briefing to accompany town hall meetings, a manual demonstration briefing, and an automated demonstration briefing.
- ▶ Reports including analysis, memos in preparation for internal audiences or response to specific queries, with details including content and format decided on a case-by-case basis.
- ▶ Environmental signage. Should the project team decide to use outdoor signage, such as inspection stations, they will be designed and produced in line with other project materials. Signage and related "point of purchase" flyers could also be used at DMV, gas stations, and popular community gatherings.

2.3. Stakeholder Assessment, Engagement, and Management

2.3.1. Purpose of Stakeholder Assessment, Engagement, and Management

The prospect of a road usage charge impacts every resident of Hawaii, especially drivers. The project will attempt to engage with as many members of the public as possible through town hall meetings, telephone surveys, focus groups, and the pilot activities themselves (both the manual and automated phases). However, stakeholders and stakeholder groups represent specific issues, interests, or sub-categories of residents, making engagement with them more efficient feedback loop with HDOT and lawmakers around the policy possibilities of RUC.

By assessing the stakeholder landscape in Hawaii at the outset, the project team can optimize the use of project resources around public engagement. Once stakeholders are assessed, the project team will engage with them using a range of activities suited to each, including holding direct meetings, holding town-hall meetings, assembling an advisory committee, developing understanding within HDOT, and supporting project champions. Finally, the project team will employ a range of tools and materials to support these activities via ongoing management of stakeholders.

Stakeholder engagement spans the full duration of the project. The range of attitudes toward RUC will be broad, from vehement support to passionate opposition. By engaging with all stakeholders regardless of their attitudes at the outset, the project aims to bring concerns, issues, and objections into

the project process, rather than avoiding or ignoring them, and address them through discussion and analysis of alternative approaches for their resolution, including some alternatives that can be tested in the live demonstration. Although the initial stakeholder assessment is conducted only at the outset, the engagement approaches and messaging will be constantly updated to reflect project risks, opportunities, and sentiments, and to add and revise analysis of stakeholders as needed.

2.3.2. Conducting the Stakeholder Assessment

A stakeholder assessment is a deliberate method of identifying and evaluating leaders and audiences in Hawaii who are impacted by and/or can have an impact on RUC. A tailored engagement approach will be developed for each stakeholder depending on their salience and interest. The project team will sort stakeholders into several audiences, conceptually “concentric circles,” with the most salient stakeholders in the inner circle, and stakeholders of decreasing salience in outer circles. Tier 1 includes state level elected officials and appropriate government agencies, as well as HDOT staff. Tier 2 includes county level elected and appointed leadership. Tier 3 and beyond includes business leaders/groups, unions, community influencers, PMVI inspectors, and the general public. The purpose of meetings in general, and especially with Tier 1 and 2 audiences, is to 1) establish a connection, 2) provide an overview of the project, and most importantly, 3) get feedback on potential barriers, pitfalls, cultural differences and expectations.

In parallel, the project team will prepare a stakeholder map to be maintained and updated throughout the length of the project. The map will plot stakeholders along two dimensions: their degree of influence over RUC and the degree to which their interests are affected by RUC. This approach is outlined in the RUC West Roadmap for Considerations of a RUC System. This approach allows the project team an analytical lens through which to monitor stakeholder engagements, in addition to the direct feedback from meetings.

2.3.3. Engagement Activities

This section covers the types of engagement activities the project team anticipates utilizing for the RUC project, outside of the demonstrations themselves. These engagement activities will span the full duration of the pilot, with their application depending on the stakeholder in question, resources available, project schedule, and risks and opportunities at any given moment.

One-on-one engagements. One-on-one meetings can have high impact for a limited audience. These types of engagement are reserved for the most salient stakeholders – those with the strongest influence over RUC and/or ability to serve as ambassadors within their own networks on the topic. In addition to the general purposes of such meetings, they can be used to convey critical or sensitive project information to important individuals in a controlled environment. Types of one-on-one engagements include:

- ▶ In-person office visits or coffee/tea meetings
- ▶ Telephone discussions
- ▶ Personal emails, when necessary

Group engagements. Group engagements tend to have a more limited impact but for a broader audience. They require more advance preparation and orchestration. The project will take advantage of the existing infrastructure of public and interest group meetings and events, where possible and where welcome. The project will also host forums of its own to provide an identity and explicit opportunity for individuals (members of the public) with a strong interest in expressing views to attend. Types of group engagements include:

- ▶ Town-hall meetings and e-town-hall meetings where the primary topic is transportation funding, RUC, and the demonstration project (organized and hosted by the project)
- ▶ HDOT and partner agency organizational meetings and staff meetings where RUC is an invited topic (organized and hosted by HDOT and partner agencies)
- ▶ Neighborhood board meetings where RUC or transportation funding is an invited topic (organized and hosted by neighborhood boards)
- ▶ Conferences, workshops, industry briefings, and other forums where RUC is an invited topic (organized and hosted by outside groups)

HDOT internal staff engagement. The project team will work with HDOT leadership to provide regular updates to the internal steering group as well as to staff at the appropriate times. As the front line “face of transportation” in their communities, HDOT employees often face questions and complaints from their family, friends, neighbors, and colleagues about transportation issues. By preparing the agency staff with accurate, digestible information about the project, they can play a major role as ambassadors of the project within their own communities when asked. Enlisting such support from HDOT staff requires the support of their management (HDOT leadership), as well as preparation of appropriate, helpful materials disseminated efficiently to the agency. In addition, a mechanism for taking in questions and comments from HDOT staff into the project team should be set up, similar to the help desk for the general public, to ensure that information is captured for the benefit of the project and also so that HDOT staff get attention and answers.

Advisory committee. HDOT will convene this group of the elected officials, agency officials, and interest groups of high salience. The explicit purpose of the advisory committee is to receive periodic project updates and serve as a forum for deliberations on project questions, providing advice to HDOT and the project team. The HDOT RUC project manager will serve as the liaison and facilitator of the committee, with support from the project team in the preparation of materials and conduct of meetings. It is desirable to limit the size of the committee to a manageable number of about 15, and probably in no case more than 20 individuals. However, this manageability feature must be balanced by the importance of inclusiveness. The most sensitive single type of participant on the advisory committee is stakeholder group representatives, because inviting only one or a small number of groups may signal preferential treatment over other interested groups. There are ways to address this complication. One way is to allow stakeholder groups to attend all the meetings, and present their positions or issues from time to time. Another is to create a separate, formal stakeholder forum that meet via tele-conference or other means prior to each advisory committee meeting. Below are several illustrative options for assembling a advisory committee.

The advisory committee should be assembled during the early part of the manual demonstration setup, to allow for inputs to be heard into the design and setup process. Meetings should be held approximately two or three times per year, no more than four, given the time constraints of the types of individuals targeted for participation. The evolution over time of the advisory committee may appear as follows:

- ▶ In the initial phase, the purpose is to receive an orientation to the problem and the project; review public opinion research data; provide input including questions, issues, and concerns, which will help in the development of the policy work plan; and provide input to the design of the manual demonstration, which will help the technical team achieve better outcomes from the outset.
- ▶ As the manual demonstration nears launch, the advisory committee can serve as a sounding board for demonstration concepts and as a dissemination point for project information to constituents as well as the personal and professional networks of the of the committee members.

- ▶ During the demonstrations, the advisory committee serves both as a venue to report formally, including public information releases about the status of the project, and as a venue to explore alternative approaches for addressing key issues.
- ▶ During the reporting period, the role of the advisory committee transitions to one of advice on recommended contents of the final report around policy. The committee can also serve as an official recipient of the final report from HDOT.

Electronic engagement. In addition to the project website and help desk (which includes a telephone line and email), the project team will explore social media and e-town halls as prospective venues for additional engagement with individuals and stakeholder groups. By researching best practices from other HDOT and FHWA programs, the project team may adapt some ideas and apply them to the RUC demonstration.

Manual demonstration small-scale roll-out. A special direct engagement opportunity unique to the Hawaii project is the small-scale roll-out for the manual demonstration. Because of the widespread nature of the anticipated manual demonstration, the project team will conduct a small-scale “roll-out” using a pool of HDOT staff, and possibly others to be determined, as recipients of the indicative billings prior to launch of the full-scale manual demonstration. The purposes of this small-scale roll-out, aside from testing the functionality of technical aspects, will be to gather additional feedback on the process. Should the roll-out include participants beyond HDOT, the purpose would be to prime them to inform their networks about what to expect in the forthcoming demonstration.

Demonstrations. The demonstrations themselves (manual and automated) are obvious and large-scale opportunities for direct engagement by design with the public. The evaluation team will analyze feedback received from the public and volunteers in the demonstrations. The communication and policy teams will coordinate closely with the evaluation team to understand the meaning of this feedback and its impact on communication messages and activities.

Help desk. The help desk consists of a project telephone number and email address for constituents to call or write with inquiries, including questions, concerns, or commentary. The help desk will evolve from a general information line at the start of the program to a more participant-focused source of information during the live portions of the demonstrations, with agents available to answer questions. For the launch period, the help desk features an email address and phone number with agents available to respond during regular business hours.

Workshops. At two points during the project, HDOT will host workshops, similar in scale to the event in October 2016, to convey project information to a broader gathering of stakeholders. The workshops, first in the manual demonstration preparation phase and second in the reporting phase, will offer opportunities to sound the project activities to a wider audience.

2.4. Media Engagement

Traditional print and broadcast media and well as online media serve a critical role and public service disseminating information and opinions, serving as recognized and mostly credible forums for discussion and debate, and serving as channels for framing discussion given the broad reach of such media. Taking advantage of the built-in advantages of traditional and new media in Hawaii requires mitigating risks, which can include negative coverage, misinformation and even advancement of campaigns to oppose a project.

2.4.1. Media Engagement and Protocols

The media engagement strategy for the project will be at the direction HDOT. The project team suggests a proactive strategy to the extent possible, at least at the beginning. This will mean actively reaching out to media outlets to offer information and opportunities to meet and learn more about the project. By framing the messages upfront and providing transparency as to the project purpose and activities, the project and HDOT can protect against the risk of negative coverage based on misinformation.

HDOT will designate key spokespersons as well as backups and background experts. The roles of these spokespersons will be as follows:

- ▶ Primary spokespersons: Tim Sakahara, Shelly Kunishige, and Scot Urada
- ▶ Subject matter experts: Consultant team

The team will adhere to HDOT's procedures for media contacts.

The project team will have a single point of contact for media whose role is to monitor contact with the media and facilitate scheduling. Throughout the project, the purpose and content of media engagement will change.

- ▶ Launch. During launch, the purpose of media engagement is to explain the context, the project, and its future activities. The project team hopes to use earned media (and possibly social media) in conjunction with town halls and e-town halls to reinforce awareness of the topic and opportunity to provide input.
- ▶ Manual demonstration setup and operations. During the manual operations setup period, engagement will be informative in nature, responding to inquiries, but with a lower level of proactive engagement, and with the purpose of reinforcing initial messages.
- ▶ Automated demonstration setup. During recruitment, the project team will use earned media strategically to amplify recruiting messages for the automated portion of the pilot.
- ▶ Automated demonstration operations. As with the manual demonstration operations, the primary orientation during automated operations is informative, and more responsive than proactive. The purpose is to showcase the activities of the pilot and to highlight progress and accomplishments of participants.
- ▶ Report. During the final reporting phase, the orientation is to report findings.

2.4.2. Media Monitoring

Media monitoring has several purposes.

First, the project team will monitor local traditional media for coverage of stories about RUC or transportation funding in Hawaii that relate directly to the project. Such stories can shape public opinion, so it is important to know what is being said so that the communication team can fold that information into the digest of feedback for policy and technical consideration. It may also be necessary to provide facts to support accurate reporting.

Secondly, media monitoring can identify stories on topics that are indirectly related to the RUC project, but that may impact the policy discussion of RUC, based on local, national, and even international news. By feeding this information into the policy and technical work streams, the RUC project can improve the likelihood of designing policies and systems that meld with local priorities and issues even beyond transportation.

Finally, media monitoring can identify emerging issues and risks such as misinformation. By detecting these emerging issues and risks through regular monitoring, the project team can engage with media outlets to provide corrections, information, and create relationships for future dialog and accurate reporting.

Media monitoring will feature the following activities:

- ▶ Print and online. Project team staff scan the major print (and their online counterpart) outlets in all Hawaii counties, including the Star, Civil Beat, Pacific Business News, MidWeek, West Hawaii Today, Maui News, Garden Island, and Tribune-Herald including via news alerts with keywords that signal relevance to the project.
- ▶ TV. Project team staff scan the websites for Hawaii News Now, KHON, and KITV for news of relevance to the project.
- ▶ Social media. Monitor and join where necessary groups of potential relevance to the project, including key individuals, transportation- and mobility-themed groups, and other civic groups on Facebook and Twitter.

The output of the above monitoring activities will be a weekly digest of articles, stories, and posts of relevance to the project, divided into categories, sent via email with links to the items of interest. Initially, we suggest the following categories, but these are subject to adjustment and updating as the project advances:

- ▶ Hawaii RUC-related news
- ▶ Hawaii transportation-related news
- ▶ Other local news relevant to the project
- ▶ National and international RUC news
- ▶ Special category: risky/negative articles, stories, and posts worthy of considering a response
- ▶ Special category: articles, stories, and posts worthy of promoting

2.5. Public Opinion Research

The purpose of public opinion research is to assess the baseline understanding and views of the public in Hawaii, statewide, regarding transportation issues, including funding, and the concept of RUC. By gathering this baseline information, the project team can better understand the starting point for understanding of issues of the public at whom the demonstration is aimed as well as the questions, issues, and concerns about RUC that the public is most likely to raise.

2.5.1. Focus Groups

The research objectives of the focus groups are to assess awareness and perception of the road and highway transportation system, funding, and RUC. The range of questions that will be explored includes:

- ▶ What do participants know about transportation funding and how do they get information about it?
- ▶ What are common misconceptions in project communication that need to be cleared?
- ▶ What do participants think when they hear of RUC and what are common questions (e.g., cost per mile) that arise during discussion?
- ▶ What are Hawaii-centric issues (e.g., rail) or concerns?

The findings in other states revealed common themes, such as privacy and equity. The focus groups will examine those concepts to see if they are important locally or if there are other unique opinions or concerns driving the thought process. The information learned from the focus groups will be used by the communication team to tailor their efforts, in order to be effective in engaging with the public about RUC.

2.5.2. Telephone Surveys

As with focus groups, the research objectives of the telephone surveys are to assess awareness and perceptions of road and highway transportation system, funding, and RUC. The distinction from the focus groups is that questions will be more high level and quantitative so that the results can be aggregated in a way that reflects overall views of the population of the state with some degree of statistical confidence.

The project team will develop questions for the telephone survey based on findings from the focus groups as well as overall project objectives and input from the project steering group and, if available, the advisory committee. Telephone surveys must be relatively short in order to capture a sufficient number of “complete” surveys to provide statistical confidence. Once the questions are agreed and finalized, the surveys will be fielded from a Hawaii-based call center. The results will be summarized into a final report.

3. Statewide Public Opinion Research

3.1. Initial Public Opinion Focus Groups

The first step in the research program was conducting a series of exploratory focus groups to assess awareness and perceptions of Hawaii’s road and highway transportation infrastructure, funding, and possible road usage charge program. Starting the research program with qualitative research allowed the team to explore attitudes; learn from the questions residents asked in order to better understand RUC; and uncover beliefs and misconceptions that might be barriers to understanding and/or acceptance.

Ward Research conducted focus groups to explore these objectives to explore the viability of a RUC. Ten focus groups were conducted from October 8 through October 19, 2018, among 93 Hawaii residents, designed to gather driver input from diverse viewpoints. In order to assess consistency or discrepancy across islands, the focus groups were segmented geographically, as shown in Table 2.

Table 2: Focus Groups

ISLAND	# OF GROUPS	# OF PARTICIPANTS
Oahu	3	29
Oahu – EV and hybrid vehicle owners	1	10
Hawaii Island (conducted in Hilo)	2	15
Hawaii Island (conducted in Kona)	2	19
Maui (conducted on Oahu)	1	10
Kauai (conducted on Oahu)	1	10

Participants reflected a cross-section of residents by demographic characteristics such as gender, ethnicity, type of vehicle owned, occupation, household income, area of residence, and average miles driven daily. All of the groups were moderated by Rebecca S. Ward, President of Ward Research. The groups on Oahu were observed by representatives of HDOT and the HiRUC consulting team from the adjoining observation room. In order to specifically assess the opinions and perspectives of those likely to be most impacted by a RUC in the near term, one group on Oahu consisted exclusively of owners of electric and/or hybrid vehicles.

Several findings from the focus groups provided strategic input into the design of the subsequent quantitative surveys:

- ▶ With a lack of information, participants assumed the worst --- without being told the average RUC that was being considered, participants assumed amounts 2.5 to 10.0 times the actual amount being considered. This underscored the need to educate while collecting opinions and the need to provide reference points for survey respondents (in terms of what they paid on annual state gas tax and estimated RUC). These reference points were planned for the Driving Reports and surveys.
- ▶ Residents were less resistant to a RUC when they knew it was a replacement of the state gas tax and that the average driver would pay \$80 in estimated RUC annually. These points were emphasized in the quantitative telephone survey, with the former also being a point of emphasis in the Driving Reports.

3.2. Public Opinion Telephone Survey

A telephone survey was conducted between December 3, 2018 and January 31, 2019 among a total of n=1,519 residents statewide. The overall objective of the telephone survey was to quantify the findings of the focus groups by 1) Measuring the awareness and beliefs about Hawaii’s road and highway transportation funding; 2) Measuring public opinion on the support for, or opposition to, replacing the state gas tax with a road usage charge; 3) Testing messages in support for and opposition to implementing a road usage charge; and 4) Assessing the preferred method of reporting and frequency of payment. The survey instrument was developed by Ward Research and submitted to HDOT.

In order to assess consistency or discrepancy across islands, interviews were conducted across counties. The distribution by island county was as shown in Table 3.

Table 3: Telephone Survey Participants

ISLAND	# OF INTERVIEWS
Oahu	n=603
Maui	n=310
Hawaii (Big Island)	n=303
Kauai	n=303

Key takeaways from the telephone survey included:

- ▶ There was an apparent lack of knowledge among state residents about transportation infrastructure funding (e.g. gas tax), which reaffirmed that the Driving Report and survey instruments needed to provide basic facts and education on this issue.
- ▶ Reporting mileage at their annual safety check was the most preferred reporting method.
- ▶ Annual payment of a RUC was preferred by a majority of residents, although smaller payment options should also be offered.
- ▶ When testing messages in support for, or opposition to, implementing a RUC, the underlying theme of “fairness” became apparent (with strong support for messages emphasizing road use and miles driven, instead of fuel use).
- ▶ There were quantifiable differences in non-EV versus EV perspectives, which need to be further explored in the quantitative surveys.

All of these were incorporated into the components of the large-scale mail survey accompanying the Driving Reports for quantitative confirmation, or to see if public opinion changed over time. Detailed results of the Driving Report surveys can be found throughout the final report (Volume 1) and in Appendix A-5.

4. Community Meetings

After conducting public opinion research to gauge baseline understanding of the public about transportation funding issues, the HiRUC project team prepared for a series of community meetings in order to gather input from as many viewpoints as possible on the concept of RUC and to inform the design and execution of the pilot program. The HiRUC team planned and conducted 13 community meetings in all four counties and on six islands.

Although community meetings are an important part of public outreach, turnout was not expected to be large. To make the most of the effort and resources, the community meeting plan aimed to ensure getting word out so people across the state would have sufficient opportunity to attend an in-person forum to learn about HiRUC and voice their opinions.

The community meeting plan called for 13 in-person meetings, three on Oahu, two on Kauai, three on Maui, three on Big Island, and one each on Lanai and Molokai. and 10 on neighbor islands, plus one online meeting. The purpose of the meetings was as follows:

- ▶ Deliver information to a wider audience
- ▶ Engage and listen to community members and stakeholders
- ▶ Gauge community sentiment
- ▶ Identify and understand potential issues, problems, and possible solutions
- ▶ Generate news coverage
- ▶ Identify potential demonstration volunteers

4.1. Preparations

Hastings & Pleadwell led the effort of organization each meeting, including undertaking the following tasks:

- ▶ Secure venues
- ▶ Develop and circulate news releases, e-news, and advertising
- ▶ Prepare presentation deck
- ▶ Prepare collateral materials including posters
- ▶ Provide audio/visual support
- ▶ Furnish simple refreshments
- ▶ Set up and take down signage, equipment, and materials at each venue

The project team prepared for each meeting in advance by researching profiles of each community, including specific local characteristics, issues, challenges, opportunities, demographics, infrastructure and transportation topics of note, and tax and funding topics of note. These background briefings helped the project team prepare presentation materials and identify and engage with local stakeholders in advance of each meeting.

The format for each meeting included the following “run of show:”

- ▶ Welcome guests, including sign-in sheets to collect emails for those who opt-in to receive e-news and express interest in volunteering for the pilot test.
- ▶ Serve light refreshments.
- ▶ Provide short presentation and brief video on the project, leaving the specific format flexible to accommodate turnout.
- ▶ Moderate interactive question and comment session, including an opportunity for attendees to write their comments or questions on note cards if they do not wish to speak.

4.2. Schedule

Table 4 shows the schedule of community meetings by location.

Table 4: Schedule of Community Meetings

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
3/17	3/18	3/19	3/20 Oahu #1 Kapolei	3/21	3/22 Kauai #2 Koloa	3/23 Kauai #3 Lihue
3/24	3/25 Maui #4 Lahaina	3/26 Maui #5 Kahului	3/27 Maui #6 Paia	3/28	3/29	3/30
3/31	4/1	4/2 Molokai #7 Kaunakakai	4/3	4/4 Lanai #8 Lanai City	4/5	4/6
4/7	4/8 Hawaii #9 Kona	4/9 Hawaii #10 Waimea	4/10	4/11	4/12	4/13
4/14	4/15	4/16 Oahu #11 East Honolulu	4/17 Oahu #12 Kaneohe	4/18 Online #13	4/19	4/20
4/21	4/22	4/23	4/24	4/25	4/26	4/27
4/28	4/29	4/30	5/1	5/2	5/3	5/4
5/5	5/6	5/7	5/8	5/9 Hawaii #14 Hilo	5/10	5/11

The schedule was intended to align with the legislative calendar to ensure the possibility that any local lawmakers representing each community could attend.

4.3. Promotions

Promotional materials for each meeting included the following:

- ▶ Media kit
- ▶ Pitches to specific media outlets
- ▶ Press releases for specific island media

- ▶ Promotional videos on social media
- ▶ Social media ads targeted to specific island communities
- ▶ E-news
- ▶ Placing notices in partner stakeholder newsletters such as Chambers of Commerce
- ▶ Providing notice of meetings at neighborhood board meetings

4.4. Sample Community Meeting Run Sheet

Below is an example of a “run sheet” followed for the day of each community meeting:

6:00am – 8:00am	Sunrise/Morning Show with local TV station
8:30am – 10:30am	Newspaper editorial board meeting
11:00am – 12:00pm	Media interview
12:00pm – 1:00pm	Lunch break
1:00pm – 4:00pm	Meetings with local stakeholders, community leaders
3:00pm – 5:00pm	Pick up refreshments, setup venue (equipment, signage, collateral)
5:00pm – 5:45pm	Community arrives, sign-in provide refreshments, host info stations
5:45pm – 6:05pm	Community meeting presentation
6:05pm – 6:25pm	Questions and comments
6:25pm – 7:00pm	Informal questions with community members, final remarks
7:00pm – 7:30pm	Spokesperson available to speak with media, venue break down

5. Stakeholder Engagement

In conjunction with the community meetings, HDOT undertook an effort to reach out directly to stakeholder groups across the state. This outreach process followed a deliberate plan to allow local elected officials and appropriate government agencies to engage with the project team first and provide insights and recommendations. Next, county-level elected and appointed leadership were consulted, followed by local business leaders and groups, unions, and community influencers. The goal of these meetings was to establish a connection, provide an overview of the project, and most importantly get feedback on potential barriers, pitfalls, cultural differences and expectations that vary from community to community. Each meeting ended with a request for recommendations of who to meet with next and for help with identifying topics of importance for that particular community. The emphasis of the meetings was on listening, asking questions, and striving to understand the starting point for each place.

In addition to consulting with lawmakers and leadership within HDOT and peer state government agencies, the project team also reached out to local (county) agencies and elected officials in conjunction with each community meeting. In all the project team met with over 40 local organizations including Chambers of Commerce, local businesses, civic associations, business associations, Rotary Clubs, community assistance groups, county council members, and county agencies. Each meeting provided insights for the conduct of the community meeting as well as opportunities for further engagement throughout the pilot.

6. Advisory Group Engagement

6.1. Purpose

HDOT convened a stakeholder advisory group (Advisory Group) for the project that included law and policy makers, various state and county departments, operators of vehicle fleets, environmental organizations, and the general public. The members were selected to represent a cross section of stakeholders and provide input into the RUC discussions.

6.2. Membership

The Advisory Group comprised the following members and constituency representatives:

- ▶ State legislature (Senate President)
- ▶ State legislature (House Speaker)
- ▶ State legislature (Senate Transportation Chair)
- ▶ State legislature (Senate Ways & Means)
- ▶ State legislature (House Transportation)
- ▶ State legislature (House Finance)
- ▶ City and County of Honolulu
- ▶ County of Kauai
- ▶ County of Maui
- ▶ County of Hawaii
- ▶ State Department of Taxation
- ▶ State Department of Business, Economic Development & Tourism
- ▶ Auto Club of Southern California
- ▶ Blue Planet Foundation
- ▶ Chamber of Commerce
- ▶ Hawaii Tourism Authority
- ▶ Hawaii Transportation Association
- ▶ Tax Foundation of Hawaii
- ▶ Economically Disadvantaged Communities

6.3. Roles & Responsibilities

HDOT's role on the project is to lead the HiRUC project in conformance with its federal grant agreement; conduct research through the demonstration efforts; compile and report on the results of the research, including findings from engagement with stakeholders and the general public, technical findings of the demonstration effort, and policy issues and alternatives for addressing them; and compile and report objective findings for public consumption.

The Advisory Group's role was to offer issues, concerns, opinions and questions that the HDOT should address in its research that may not already be considered, especially those issues that affect the constituencies of the group; offer advice to HDOT on the policy and high-level concept design choices to simulate RUC in the demonstrations, with aim of ensuring that the research achieves maximum benefit and relevance for policy makers; and offer advice to HDOT on the range of possibly policy prescriptions for issues identified.

Advisory Group members were asked to:

- ▶ Attend the Advisory Group meetings.
- ▶ Review public opinion focus group data, public opinion survey data, and any other data gathered or produced by HiRUC.
- ▶ Provide input based on the data for consideration by HDOT in the development and implementation of this demonstration project.
- ▶ Consider and discuss issues from a Statewide perspective, as well as their own and the stakeholder group that they represent.
- ▶ Represent their organization and mission; communicate project information to their organization or constituents; obtain opinion and input from your organization or constituents; and convey summarized input to the Advisory Group.
- ▶ Make recommendations to HDOT to guide policy development of RUC, selection of alternatives, convey and communicate such decisions to your organization.
- ▶ Make recommendations to develop criteria that will be used to evaluate HiRUC.

6.4. Operating Procedures

The Advisory Group followed the procedures set forth below.

1. The Advisory Group will be chaired by HDOT Project Manager (Chair) or designee as determined by the HDOT.
2. Upon completion of HiRUC, the Advisory Group will be dissolved.
3. Each Advisory Group member shall designate an alternate person who may attend meetings in their place.
4. The term for each Advisory Group member (or alternate) shall be for the duration of the HiRUC project.
5. The Advisory Group will operate by consensus. The goal will be to reach unanimous consensus, meaning all members can support the Advisory Group recommendations. If unanimous consensus cannot be reached, the majority opinion as determined by vote will be conveyed as the Advisory Group recommendations to HDOT, with differences of opinion noted and included as part of the Advisory Group recommendations in lieu of a minority report or dissenting report.
6. Quorum will be defined as a minimum of 11 members present. A particular member who is unable to attend any meeting in person may participate via video conference or teleconference if such communication facilities are available at the meeting venue. Advance notice will be made prior to the meeting date. Alternatively, if an Advisory Group member cannot attend a meeting and wishes to make a statement regarding an agenda item, he or she may provide the Chair with a written statement, which will be read to the full group when the issue is being considered.

7. When a topic arises that is not relevant to the current discussion, it will be noted in a “parking lot” to keep the primary purpose of the meeting moving forward. At the end of the meeting, the parking lot items will be reviewed along with next steps for addressing them at future meetings or other alternative methods.
8. Meeting summaries will be prepared and shared via email for review and comment by Advisory Group members before a final version is posted on the HiRUC project website.
9. It is understood that the Advisory Group members may need to consult with their organizations before making or endorsing recommendations on their behalf. Each member shall collect and communicate any concerns or issue raised by their organization and communicates those issues in a timely fashion to the full Advisory Group, and to provide the Advisory Group with an opportunity to respond to the issues or concerns.
10. Reports or other products will be written in a manner that fairly and accurately reflects the findings, recommendations and opinions of the Advisory Group. Where clear differences of opinions remain on important issues, the final report or product will properly capture and convey the divergent views.
11. HiRUC project direction and decisions on direction and policy may be a product of the Advisory Group actions; however, HDOT will issue official announcements and informational releases regarding HiRUC.

6.5. Outcomes

The Advisory Group met five times during the course of the project. Meetings were scheduled at key points in the project in order to solicit input from the Advisory Group.

- ▶ Meeting 1 (December 18, 2018): convene and receive an orientation to the problem and the project; provide input including questions, opinions, issues and concerns to help in the development of the project; review preliminary results of the statewide public opinion research; hear high-level plans for the remainder of the project.
- ▶ Meeting 2 (April 12, 2019): review final public opinion research results; provide input including questions, opinions, issues and concerns to help in the development of the project; provide input into the design of the manual demonstration to help the technical team achieve better outcomes
- ▶ Meeting 3 (October 4, 2019): serve as a sounding board for demonstration concepts and assist in dissemination of project information to constituents as well as personal and professional networks.
- ▶ Meeting 4 (May 5, 2021): serve as both a venue to report formally, including public information releases about the status of the project, and as a venue to explore alternative approaches for addressing key issues encountered.²
- ▶ Meeting 5 (January 13, 2022): receive updates on RUC developments nationally; review draft recommendations, policy papers, and final report content.

² A meeting hiatus due to COVID-19 led to delays in the execution of the Driving Reports (part 1) and launch of the Technology Test Drive (part 2) until spring 2021; due to this delay, the Advisory Group reconvened virtually in May 2021.

7. Peer Exchange Workshops

Pursuant to the requirements of the federal grant that funded HiRUC, HDOT hosted two peer exchange workshops in Honolulu. Content including agendas, presentations, and video proceedings of the two workshops were posted to the (HiRUC) project website.

7.1. Workshop 1

The first workshop was conducted on October 10, 2019. This workshop provided the opportunity for a peer-to-peer information exchange among Hawaii and mainland legislators, agency staff, and stakeholders with the objective of sharing information and thinking on the following topics:

- ▶ Strategies used in public outreach and messaging
- ▶ Experiences in addressing public concerns related to RUC policies
- ▶ Approaches taken in addressing specific concerns from special interest groups
- ▶ Approaches in developing RUC policy or legislation
- ▶ Stories of success or learning in RUC

Speakers included representatives from HDOT, the National Conference of State Legislators, FHWA, and transportation agencies exploring RUC in Washington, California, Oregon, Utah, and New Zealand. The event also featured a panel of lawmakers from Hawaii, Oregon, Utah, Maine, Washington, and North Carolina.

Participants included Hawaii lawmakers; mainland lawmakers from Washington State; agency staff from Maui County, Hawaii County, City & County of Honolulu, and Kauai County; stakeholders from AAA, Blue Planet, the Tax Foundation, Chamber of Commerce, University of Hawaii, Uluono, and Hawaii Transportation Association; and agency staff from HDOT, FHWA, DBEDT, Nevada DOT, Oklahoma DOT, Washington DOT, Caltrans.

The program began with an update on the state of play of transportation funding and RUC nationally from Doug Shinkle of the National Conference of State Legislators. Next, HDOT Director Jade Buta described the uniqueness and breadth of Hawaii's transportation and funding challenges. Together with PAO Tim Sakahara, HDOT discussed the origins of the RUC concept in Hawaii and the motivations that led to the HiRUC study and its objectives

Next, Angela Fogle of FHWA described the federal grant funding provided under the Surface Transportation System Funding Alternatives (STSFA) program. Scot Urada, HDOT's HiRUC Project Manager, described the three-year HiRUC research and demonstration efforts, including the public outreach and communication, plans for Driving Reports, and plans for advanced technology testing in the second part of the pilot. To kick off the pilot, HDOT distributed Driving Reports to Hawaii resident stakeholders and lawmakers in attendance.

Next, a panel of lawmakers moderated by Doug Shinkle discussed their views and issues related to transportation funding and RUC. The panel included Senator Loraine Inouye of Hawaii, Representative John Lively of Oregon, Senator Wayne Harper of Utah, Senator Steve Hobbs of Washington, Representative John Torbett of North Carolina, and Representative Andrew McClean of Maine.

Clint Rule, the Creative Director for Teague, introduced the workshop participants to participatory design, a process that makes presentations and documentational material more easily received by members of the public. The purpose of this process is to obtain the public trust. This process was used in the Washington RUC pilot project and in the design of Driving Reports for HiRUC.

Randal Thomas, administrator of the Western Road Usage Charge Consortium (RUC West), introduced and moderated a panel of agency personnel about their perspectives on road usage charging. The panel was comprised of state agency personnel engaged with RUC from Oregon (Maureen Bock), Washington (Reema Griffith), Utah (Nathan Lee), California (Garth Hopkins), and New Zealand (Marian Willberg).

During the second day of the workshop, speakers participants engaged in a networking session. After a welcome, the networking participants convened around tables to discuss topics of interest pertaining to RUC as follows:

- ▶ Privacy protection in a RUC System. This topic discussed how to protect data required for collection of RUC, presenting technical, legal and choice of solution. Also presented was the Model Privacy Policy developed for the state of Washington during its RUC pilot project.
- ▶ Aligning Road Funding and Environmental Policy. This topic discussed the gas tax and RUC as road taxes, that RUC would likely replace flat fees paid for use of high mileage vehicles.
- ▶ RUC and Equity. This topic discussed the issue of fairness for RUC applications. The presentation noted that RUC can be structured to be more fair for low-income drivers because the alternative for increases in the gas tax disadvantages the mobility of the least affluent drivers more than any other driver group.
- ▶ Urban vs. Rural RUC Impacts. This topic discussed the relative impact of RUC on rural driving as opposed to urban driving. Studies in Oregon, Washington, Hawaii and the RUC West consortium have revealed that vehicles driven in rural areas are, on average, lower MPG than vehicles in urban areas and thus more likely to benefit from a shift to RUC in replacement of the gas tax.
- ▶ A National RUC Pilot. This topic discussed the possibility of a national RUC pilot project and a general description of U.S. Senate bill 2302 to establish a national research program to test the cost and feasibility of a road usage charge or fee to maintain the long-term solvency of the Federal Highway Trust Fund.

Workshop participants found the presentations of the various RUC programs and projects intriguing and useful. Several topics were of special interest, including the HiRUC mileage reporting method, the use of participatory design and the value of peer-to-peer exchanges.

7.2. Workshop 2

On May 26 and 27, 2022, HDOT convened peer agencies from mainland states, Australia, and New Zealand in a hybrid in-person and virtual workshop on the topic of RUC implementation. Where the first workshop focused on communication, outreach, and policy, the second focused on implementation, policy, and next steps for transitioning RUC programs from start-up to full-scale operations. Workshop participants shared best practices and lessons learned, discussed challenges and opportunities, and crafted recommendations for FHWA on its forthcoming national RUC pilot.

Participants in the workshop included representatives from agencies exploring, piloting, implementing, or operating RUC programs in the U.S. states of California, Connecticut, Hawaii, Kansas, Nevada, Oregon, Pennsylvania, Utah, Vermont, Washington, and the countries of New Zealand and Australia; representatives of technology companies offering goods and services to RUC programs; and members



of the HiRUC consultant team. Over the course of the two days, attendees participated in panel discussion and break-out groups designed to discuss the presentations and subject matters in smaller groups in more detail.

The first day of the workshop saw welcome remarks from HDOT as host of the event as well as FHWA as the sponsor of HDOT's HiRUC project. The morning panel explored implementation of RUC based on odometer mileage collection through existing vehicle inspections and/or emissions programs. Governor David Ige of Hawaii delivered keynote remarks over lunch. The afternoon panel explored the topic of RUC for commercial fleets, particularly light-duty fleets. The day closed with break-out groups discussing a national RUC pilot and crafting recommendations to share with the group.

The second day of the workshop began with a recap of the previous day's discussions, then proceeded to an update from five states exploring, piloting, or implementing RUC programs. The event closed with a general networking session for participants to share lessons from the two days with one another.