

NCHRP Project 20-44(30)

MEASURING THE EFFECTIVENESS OF PUBLIC INVOLVEMENT AT
FIVE STATE DEPARTMENTS OF TRANSPORTATION:

IMPLEMENTATION OF THE
NCHRP RESEARCH REPORT 905 TOOLKIT

Contractor's Final Report

Prepared for:

American Association of State Highway and Transportation Officials
(AASHTO)

Bruce Brown, Laura LaBissoniere-Miller, Kate Gunby,
Diana Barreto, Nancy Thai, Jacqueline Ramirez, Anne Frugé

PRR, Inc.

Seattle, WA

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The work was guided by a technical working group that included:

- Eileen Barron, Utah Department of Transportation (DOT)
- Julie Beaubien, Texas DOT
- Geoff Dupaix, Utah DOT
- Susan Howard, Texas DOT
- Dianne Kresich, Arizona DOT
- Katina Lear, Georgia DOT
- Jamille Robbins, North Carolina DOT
- Diane Wilson, North Carolina DOT

As some of the first to implement this toolkit, these DOTs are trailblazers. They are leaders and modeling a process for other DOTs to follow.

The project was managed by Ann Hartell, NCHRP Senior Program Officer.

Disclaimer

This is an uncorrected draft as submitted by the contractor. The opinions and conclusions expressed or implied herein are those of the contractor. They are not necessarily those of the Transportation Research Board, the Academies, or the program sponsors.

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EXECUTIVE SUMMARY

Background and purpose

Meaningfully engaging communities in transportation planning, design and construction decision-making is fundamental to successful project development. Meaningful public involvement provides opportunities for stakeholders, a diverse range of community members, and the general public to provide input on the creation of transportation solutions while also communicating to people how their input influences the decision-making process.

Public involvement practitioners apply their time and talents to develop meaningful engagement processes and need a way to measure the effectiveness of their efforts; however, transportation professionals need to also measure the effectiveness of public involvement activities to understand its value and impact. Such measurement will also allow transportation agencies to refine practices and to increase accountability with the communities they serve.

NCHRP Research Report 905: Measuring the Effectiveness of Public Involvement in Transportation Planning and Project Development includes a field-validated and practitioner-ready toolkit, developed by PRR, to measure the effectiveness of a transportation agency's public involvement activities. PRR designed the toolkit to collect feedback from the public on several indicators of effectiveness (see sidebar) and to compare that feedback with a transportation agency's perceptions. Agency staff can combine responses to calculate scores for each indicator and an overall effectiveness index.

Indicators:

- Influence and Impact
- Transparency and Clarity
- Timing
- Inclusion
- Targeted Engagement
- Accessibility

Between February 2021 and January 2022, PRR provided training and support to five state departments of transportation (DOTs) who planned to implement the NCHRP Research Report 905 toolkit: Arizona DOT, Georgia DOT, North Carolina DOT, Texas DOT, and Utah DOT.

Summary and lessons learned

PRR developed a six-step process for training and supporting the five state DOTs who planned to implement the NCHRP Research Report 905 toolkit:

1. Conducted a discovery process

PRR used online questionnaires and virtual staff interviews to collect information from each participating DOT. This information sharing shed light on culture, capabilities, needs, audiences, and project-specific challenges of each DOT which informed the training approach, materials, and implementation support provided.

Key lessons learned:

- Allow ample time and resources for the discovery process to lay a solid foundation for toolkit implementation.
- Ensure the discovery process gathers input from a variety of perspectives within the agency people including key decision-makers for the selected transportation project and people with specialized knowledge relevant to using the toolkit such as researchers and public engagement specialists.

2. Developed fact sheets for DOT leadership and the public

PRR developed a customizable and easy-to-understand fact sheet to educate agency staff and the public about the benefits of the toolkit. Developing the factsheets was a smooth process and we received minimal feedback on content from the participating DOTs.

Key lessons learned:

- During implementation and the ongoing pandemic, participating DOTs primarily engaged the public through virtual channels and could have benefited from fact sheet content in other formats such as web text or web-friendly visuals.

3. *Translated public-facing materials*

PRR translated the public fact sheet, toolkit survey, and accompanying materials into Spanish based on information received from the DOTs during the discovery process.

Key lessons learned:

- Encourage DOTs to meet with their language services teams as soon as they have identified a transportation project for toolkit implementation and have demographic data on language use for the project area. This will help staff tailor the survey to the specific language needs of that area based on demographics.

4. *Developed training materials and lesson plans*

PRR developed a web-based toolkit training program that included a series of lesson plans and presentation slides. The training program was structured to consist of three sessions, each with an accompanying slide deck: one to introduce the toolkit, another to walk through administering the survey and data processing, and a third focused on interpretation, summaries, and reporting. The slides for each training were informative and include useful resources and instructions to refer to during implementation. Each training session was designed to provide DOT staff with opportunities to share ideas, learn about how other agencies are tackling similar public involvement challenges, and spend time engaging with toolkit components through hands-on activities.

Key lessons learned:

- While the training sessions and materials were designed for interactive sessions, in the next phase we found that DOTs appreciated even more time to ask questions and for hands-on practice with toolkit components, especially the scoring tool.

5. *Delivered training*

PRR conducted a series of online training and support sessions. The trainings primarily consisted of three large group sessions with additional training provided to DOT and consultant staff one-on-one or in small groups as requested.

The online trainings were well attended by all of the DOTs. Staff expressed interest in having more time and step-by-step instructions for learning how to use the scoring tool. PRR adjusted the design and materials for the third training session to incorporate another activity around using the scoring tool, with an emphasis on data entry.

Key lessons learned:

- Ensure DOT staff have adequate time and resources for training on the toolkit, especially regarding data processing, analysis, and reporting using the scoring tool.
- Consider inviting DOT staff who conduct research or work regularly with survey data as well as others who will be using the toolkit to attend the training sessions in order to use it correctly and be more efficient with everyone's time.

6. *Provided implementation support*

PRR consultant liaisons provided personalized support to each DOT. PRR hosted quarterly peer exchange meetings for the participating DOTs to share experiences. Part of this support included creating additional resources such as a video script and frequently asked questions/answers messaging. All five DOTs were represented in the quarterly peer exchange meetings.

Key lessons learned:

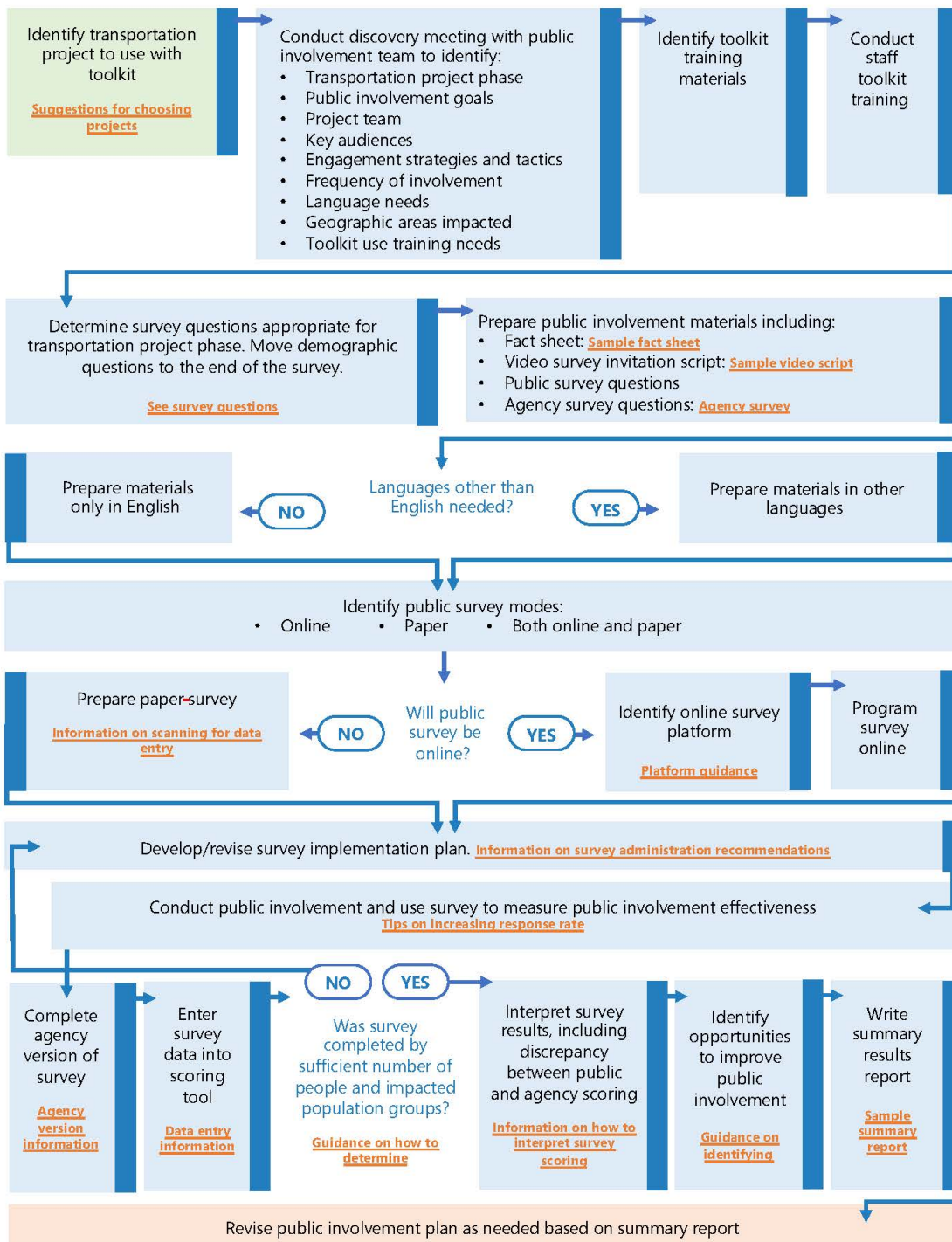
- Whenever possible, use online survey platforms that allow for downloading data in numeric form and in the order of the survey questions.
- Move the demographic questions to the end of the survey to increase the response rate.
- Customize the survey to only include questions that are relevant to the specific phases of the transportation project and type of public involvement.

Model Process

Below we present a flowchart diagramming the recommended best way to use the toolkit. A version of this flowchart with more details on how to use the toolkit is available in the Quick Reference Guide (available at: <https://apps.trb.org/cmsfeed/TRBNetProjectDisplay.asp?ProjectID=4935>).

Public Involvement Effectiveness

Measurement Toolkit Process



DETAILED RESULTS

TASK 1: DISCOVERY

Purpose: Understand the culture, capabilities, needs, and audiences of each DOT. Understand challenges specific to the transportation project on which they plan to use the toolkit.

Activities: Through online questionnaires and virtual interviews with key staff from each DOT, PRR collected information about their priorities, needs, capabilities, constraints, concerns, audiences, and translation needs, for using the toolkit in general and on their selected project. Ahead of the questionnaires and interviews, we provided background on the toolkit development process and contents.

Results: The questionnaires and interviews shed light on culture, capabilities, needs, audiences, and project-specific challenges of each DOT. The information we gathered informed the training approach and materials for Task 4 (Develop Training for Toolkit Users) and Task 5 (Deliver Training), as well as the implementation support we provided in Task 7.

Lessons for future implementors:

- Allow sufficient time and resources for the discovery process to lay a solid foundation for toolkit implementation
 - o Request key DOT staff review the draft discovery questionnaire instrument and interview guide to ensure questions are clear and effective for discovery participants
 - o Provide DOT staff at least one week, and preferably two, to complete the discovery online questionnaire
 - o Schedule discovery interviews far in advance and consider multiple interviews with different teams to accommodate schedules and availability
- Ensure the discovery process gathers input from a variety of perspectives within the agency, including:
 - o Key decision-makers for the selected transportation project using the toolkit, including people who manage the project team, public involvement leads, researchers, and people who will implement the toolkit
 - o People with specialized knowledge about the transportation project and public engagement, including people with a birds-eye view and people with specific foci such as region or geography, equity and inclusion, transportation project phase or type, etc.
- Educate DOT staff during the discovery phase about the specific skills and time commitment needed to use the survey tool so there are no surprises.

TASK 2: DEVELOP FACT SHEETS FOR DOT LEADERSHIP AND THE PUBLIC

Purpose: DOT public involvement staff use the fact sheet to share the key features of evaluating the effectiveness of public involvement with agency leadership, staff, and the public.

Activities: PRR developed a concise (two-page), plain talk fact sheet highlighting the key features and benefits of using the toolkit. We used a customizable format so each participating DOT could add their logo. We developed two versions of the fact sheet for the key audiences: agency staff and the public.

The fact sheet includes:

- Key toolkit features
- The benefits of measuring public involvement effectiveness
- The six indicators of public involvement effectiveness
- A summary of the methods for measuring the effectiveness of public involvement activities
- The *agency* version of the factsheet included a description of how the toolkit was developed and an overview of the overall NCHRP project's planned activities and timeline.

Results: Developing the fact sheets was a smooth process and we received minimal feedback on content from the participating DOTs. The fact sheet gives a high-level overview of why using the toolkit improves the effectiveness of public involvement. The fact sheets are available for download at <https://apps.trb.org/cmsfeed/TRBNetProjectDisplay.asp?ProjectID=4935>

Lessons for future implementors: Over the course of this project the COVID-19 pandemic continued to influence the trend toward more virtual public engagement. All the participating DOTs primarily used virtual engagement efforts and could have benefited from the fact sheet content in other formats, such as web text or more engaging visuals to capture public attention online. The content we created could easily be modified for a wide variety of online formats.

TASK 3: TRANSLATE PUBLIC-FACING MATERIALS

Purpose: We created a more inclusive public-facing toolkit by translating key public-facing elements to Spanish.

Activities: We translated the public fact sheet, toolkit survey, and accompanying materials (e.g., any instructions for completing the survey) into Spanish. Our Spanish language services team prioritized asking comparable questions on the toolkit survey to ensure we collected valid data that is comparable across languages. We offered to translate into region-specific Spanish, although no participating state DOTs requested region-specific Spanish versions of the survey.

Results: PRR translated the public fact sheet, toolkit survey, and accompanying materials into Spanish. The Spanish language services team reviewed the Spanish survey in the online platform to ensure online survey participants would have the same experience as English users.

Lessons for future implementors:

- Encourage DOTs to meet with language services teams once they have identified a transportation project. This will help staff tailor the survey to their specific needs and translate materials.
- If the DOT has staff who use languages commonly used within the community, they should meet with language services teams to develop an approach for translations.

TASK 4: DEVELOP TRAINING FOR TOOLKIT USERS

Purpose: Develop scalable training materials and resources for effective transfer of knowledge and skills from the consulting team to DOT staff. Participating DOTs and future DOTs can use these training materials and resources for years to come.

Activities: We developed a web-based training program for DOT staff to equip them to effectively implement the toolkit. See the Appendix for an overview of training materials.

Topic areas included:

- Toolkit components and their relationship to one another
- Criteria for choosing transportation projects
- Survey administration (guidance around time commitment, logistics, response rate, reaching historically marginalized communities, how to incorporate the survey with comment forms or other surveys, etc.)
- Data entry, cleaning, analysis using the scoring tool, and interpreting results
- Reporting results (internally and externally).

We created a series of lesson plans and slide presentations. We designed three large group sessions: one to introduce the toolkit, another for administering the survey and data processing, and a third for interpretation, summaries, and reporting. These sessions were designed to include small break-out sessions on inputting data into the scoring tool, adjusting a public involvement plan based on scoring tool results, and deeper conversation (reflection on why effective public involvement is important for the agency's work, ways to improve representativeness among survey respondents, etc.). In addition to the group lessons, PRR shared all the training materials and toolkit resources through an online platform.

Results: The training materials were informative and content rich. PRR structured the trainings to intentionally provide DOT staff with opportunities to share ideas, learn about how other agencies are tackling similar public involvement challenges, and spend time engaging with toolkit components through hands-on activities.

Lessons for future implementors:

- Ensure training and related materials are interactive and provide opportunities for hands-on practice with toolkit components and the scoring tool in particular.

TASK 5: DELIVER TRAINING

Purpose: Support the five DOTs in becoming familiar with the toolkit so they have the knowledge and resources to use it on their selected transportation project(s) as part of this overall NCHRP project and to use it on future projects. A secondary objective was to create learning materials that additional DOTs and other transportation agencies can use across the country.

Activities: PRR scheduled, hosted, and facilitated a series of online training and support sessions covering content prepared in Task 4. We worked collaboratively to provide training and answer questions as new needs emerged during the training series. All training sessions were delivered online and recorded.

The trainings primarily consisted of large group sessions with additional support provided to DOT and consultant staff one-on-one or in small groups as requested. Each large group training session focused on a select topic, working from the introduction to the toolkit through how to interpret and act on the evaluation results. The trainings were flexible and allowed for the larger group to spend extra time answering questions and delving into topics that were high priorities for the participating DOTs. The participating DOT staff were all invited to access resources and engage in an online environment for sharing information. PRR also hosted quarterly peer learning conversations for the DOTs to discuss their progress and share ideas with each other.

Results:

Staff expressed interest in having more time and step-by-step instructions for learning how to use the scoring tool. Specifically, they wanted more practice with data processing and entry into the scoring tool. PRR adjusted the design and materials for the third training session to incorporate another activity around using the scoring tool, with an emphasis on data entry.

Lessons for future implementors:

- Ensure DOT staff have adequate time and resources for training on the toolkit, especially regarding data processing, analysis, and reporting using the scoring tool.
- Consider inviting DOT staff who conduct research or work regularly with survey data, as well as others who will be using the toolkit to attend training.

TASK 6: PHASE II PLAN

Purpose: The purpose of the Phase II Plan was to lay the foundation for the remaining project tasks, especially the implementation phase of the project (Task 7). Overall, the purpose was to:

- Incorporate new insights from the discovery process (Task 1) and training experience (Task 5) with each DOT
- Highlight implementation recommendations from our revised Implementation Memorandum used during the training phase
- Emphasize ways to increase equitable public involvement with a special emphasis on participation from marginalized and underserved individuals and communities
- Incorporate human-centered design principles especially for public-facing documents
- Include implementation options for in-person and online public involvement relative to the potential need for continued social distancing
- Incorporate feedback from the project panel to ensure responsiveness to the NCHRP process.

Activities: We developed a detailed plan for Phase II that incorporated insights from the previous tasks and accommodated any requirements for physical distancing that might affect public involvement activities by the participating DOTs during the Phase II effort. We presented the Phase II plan to the panel for review and revised based on their feedback.

Results: Overall, the Phase II plan emphasized continuing to support DOT staff as they used the toolkit. It also focused on improving the toolkit for other state DOTs, MPOs, and their partners to implement the toolkit after this pilot project concludes.

The support identified in the plan focused on assigning a PRR liaison for each DOT and then holding a kick-off meeting with each DOT to identify their needs, key issues, and create a plan to support them.

Anticipated areas for support included:

- Developing messaging for the public and agencies on the benefits of taking the survey
- Possible resistance within their agency to using the toolkit, especially around using the scoring tool and interpreting the data as a measure of public involvement effectiveness

- Barriers to incorporating toolkit elements in the agency’s existing public involvement process and materials
- Lack of internal resources, including staffing and budget to implement the toolkit
- Low survey response rates
- Increasing participation in the survey among diverse populations
- Writing summary reports that provide clear direction on areas for improvement.

The plan also identified the following principles to guide our support:

- The DOTs are engaging community members in projects, policies, and practices that directly impact their lives. Effective public engagement helps agencies do their work better and use resources more effectively. It is an honor to do this work.
- The purpose of evaluation is to improve. It is important to welcome and use the “good, the bad, and the ugly,” as part of continuous quality improvement.
- By doing this evaluation, agencies open themselves up to direct feedback from the public. At the same time, it is a chance to hear about what is working and what needs to improve. That gives agencies an opportunity to adjust strategies and tactics to better engage people and achieve project goals.
- Encourage DOTs to continue using the toolkit throughout the entire project lifecycle to allow for early feedback from the public, tracking performance over time, and course corrections as needed. The survey data provides information to adapt outreach, pinpoint issues, improve programs, and demonstrate outcomes.

Lessons for future implementors: There are no lessons for future implementors for this task for this specific project but using a phased approach is noted as useful for implementation projects in general.

TASK 7: IMPLEMENTATION SUPPORT

Purpose: Provide support to the participating DOTs and their consultant teams as they used the toolkit. Understand the experiences of DOTs as they use the toolkit to refine, as needed, resources for using the toolkit.

Activities: The PRR team assigned a staff liaison to provide personalized support to each DOT. We also created and shared resources to support all DOTs, including a video script, Frequently Asked Questions Document, and convened quarterly peer exchange meetings for DOTs to share their experiences and support one another. Below is a summary of our support for each DOT team.

Results:

- ***Utah Department of Transportation***

During implementation, PRR met with UDOT’s staff leading the scoring process to troubleshoot issues related to the proprietary survey platform the agency uses. These issues were related to downloading data from the survey platform and inputting it into the scoring tool. Specifically, users discovered they must download the data in text format and then convert it to numerical format before entering it into the scoring tool. In addition, the survey question data did not download in the same order as the survey questions, which required additional processing. Additionally, many people did not complete the survey past the demographic questions. UDOT staff also noted that some survey questions were not relevant during the project scoping phase.

Overall, UDOT staff reported that they see value in using the toolkit to evaluate the effectiveness of public involvement activities and evolve their outreach activities. UDOT continued using the toolkit on another phase of the Heber Valley project. They moved the demographic questions to the end of the survey and refined the survey questions by project phase. With these changes they noticed a significant increase in response rate.

UDOT intentionally focused on working through the public survey implementation so that they could identify shortcomings, successes first. Once they were able to refine the public survey, they considered it would be much easier to implement the agency survey because the data would most likely be easier to compare.

- ***Texas Department of Transportation***

The Texas Department of Transportation (TxDOT) is implementing the toolkit as part of the Permian Promise SH 115 North proposed improvements public involvement process. TxDOT recently completed fielding a shortened, online survey as part of the virtual public meeting on the proposed improvements for SH 115 from SH 128 to SH 349 in Andrews, Dawson, Gaines, and Martin counties. Due to the status of this project, TxDOT chose to shorten the survey to remove questions about outcomes and decisions because those questions were irrelevant to the current, early phase of the project. They also omitted questions about in-person engagement for this online public involvement work.

TxDOT also fielded a shortened, future-focused version of the survey for project partners as part of the SH 225 PEL study in Houston. For that project, TxDOT shared the survey with partners after the initial engagement was complete out of concern that the survey might detract from other forms of engagement. The SH 225 PEL study project team chose to omit many of the same questions focused on future decisions and questions about in-person engagement as the Permian Promise project team. This SH 225 PEL study survey also omitted all demographic questions because the partner's demographics were not assumed to be representative of the interests they represent. Additionally, this project team chose to ask some questions in future tense to learn about partners expectations for future project phases and decisions.

PRR supported TxDOT by hosting a kick-off meeting to identify their needs and provided TxDOT with general resources, including the project fact sheet, FAQ, Use and Scoring Guidelines document, Implementation document, and video script to help promote using the toolkit.

During implementation, PRR met with TxDOT staff and vendors to support preparing to implement the survey in upcoming public involvement. PRR programmed the surveys into an online survey platform on behalf of TxDOT.

Overall, TxDOT had many questions and concerns about integrating the survey into their public involvement process. TxDOT had questions and concerns about the ease of downloading the data from their online survey platform into the scoring tool and PRR completed that step for TxDOT. TxDOT is also interested in an automated process for downloading the survey results into the scoring tool. Similar to UDOT, the TxDOT project teams made changes to remove survey questions that were irrelevant to the current phase, participant group, or virtual public involvement projects.

- ***North Carolina Department of Transportation***

The North Carolina Department of Transportation (NCDOT) implemented the toolkit during their September 2, 2021, public meeting for the Capital Boulevard North Upgrade Project. NCDOT staff shared the survey via a printed survey, a fillable online PDF, and on the project website. PRR supported NCDOT by hosting a kick-off meeting to identify their needs and provided NCDOT with general resources, including the project fact sheet in English and Spanish, FAQ, Use and Scoring Guidelines document,

Implementation document, and video script to help promote using the toolkit. NCDOT created a video that they shared with the public to explain the purpose and importance of the survey.

Similar to UDOT, NCDOT experienced challenges when downloading the data from an online survey platform in a format that is compatible with the scoring tool. NCDOT is working to include scannable barcode questions to expedite the data entry process. Thus far, NCDOT has felt confident in their ability to integrate and implement the survey into their public involvement process. NCDOT is continuing to refine their process using the survey and is considering piloting the survey on other projects.

- ***Georgia Department of Transportation***

The Georgia Department of Transportation (GDOT) initially identified a project to pilot implementation of the toolkit but shifts in the project timeline and staff availability limited the agency's participation. The GDOT participants were also concerned about customizing the survey to align with the project phase and scope, using another survey during the public comment period, and the length of the survey. Once other states demonstrated how to customize the survey and the option to post the survey after the public comment period has closed, GDOT staff expressed greater comfort with eventual survey usage. GDOT continues to seek ways to work towards implementation.

PRR provided support by testing the survey with the proprietary survey platform GDOT uses. This testing indicated that the platform is compatible with the scoring tool.

- ***Arizona Department of Transportation***

The Arizona Department of Transportation (ADOT) initially selected the Loop 101 (Agua Freeway), 75th Avenue to I-17 Improvements project to test the toolkit. PRR staff met with ADOT to kick-off the implementation support. Unfortunately, due to staff turnover, ADOT suspended implementation activities although staff attended the meetings with the other participating DOTs and expressed interest in possibly implementing the toolkit in the future.

Lessons for future implementors: see "Overall Results" on page 15.

TASK 8: PRESENTATION OF PROJECT RESULTS

Purpose: Spark interest in further implementation, explain the essentials and benefits of using the toolkit, and direct interested staff to relevant resources. One of the major goals of this online event is to overcome any potential resistance to using the toolkit to measure the effectiveness of DOTs' public involvement.

Activities: PRR designed and conducted an online event to introduce the toolkit to other state DOTs and partner agencies and presented implementation experiences by the participating DOTs. We did this through a presentation to the TRB Committee on Public Engagement and Communications

Results: PRR presented the results at the AJE40 Public Engagement Committee Meeting on 2-16-22 and answered questions after the presentation.

Lessons for future implementors: The presentation prompted questions about when and how evaluating the effectiveness of public involvement work might become a norm or required in the industry. These are topics for further discussion.

TASK 9: FINAL REPORTING AND OTHER DELIVERABLES

Purpose: PRR understood that for implementation to continue beyond this project, we needed to provide additional documents and resources to make it easy for every state DOT and MPO to implement the toolkit. Moreover, increasing awareness and enthusiasm among other state DOTs and MPOs is critical for increasing and sustaining the evaluation of the effectiveness of public involvement for years to come.

Activities: We documented the project activities and developed materials to support future implementers.

Results: In addition to this report, which documents the project activities and key findings, the following materials are available for download from the project website (<https://apps.trb.org/cmsfeed/TRBNetProjectDisplay.asp?ProjectID=4935>):

- Set of presentation slides with speaker notes summarizing the project
- A more detailed, downloadable version of the flowchart included in the executive summary of this report, in the form of the Quick Reference Guide
- Training materials and video recordings of the training sessions conducted during this project
- Fact sheet about the toolkit for use in explaining the toolkit to the public
- Spanish versions of the survey and the fact sheet

Lessons for future implementors: TBD

OVERALL RESULTS

Based on implementation of the toolkit thus far by the participating DOTs, PRR prepared an Implementation Support Memorandum and identified the following key findings and recommendations:

Table 1 – Key Findings and Recommendations

Key findings	Recommendation
Some online survey platforms are less compatible with the scoring tool.	Whenever possible, use online survey platforms that allow for downloading data in numeric form and in the order of the survey questions.
Including demographic questions at the beginning of the survey may reduce the response rate.	Move the demographic questions to the end of the survey.
The “does not apply” response category is inadequate for respondents to indicate questions that are not applicable for virtual engagement, not applicable for in-person engagement, or that have yet to occur based on the project phase.	Customize the survey to only include questions that are relevant to the specific phases of the transportation project and type of public engagement.
The length of the survey may cause a reduction in the response rate.	Customize the survey to only include questions that are relevant to the specific phase of the project (see recommendation 3) and delete or shorten Q18 when appropriate (see below).

18. What public involvement activities have you participated in for this project? (Check all that apply)

- | | |
|---|--|
| In-person public meetings/open houses <input type="checkbox"/> | Stakeholder round tables <input type="checkbox"/> |
| Online public meetings/open houses <input type="checkbox"/> | Door-to-door outreach <input type="checkbox"/> |
| Focus groups (usually involves 6 to 12 people meeting for 1 to 2 hours) <input type="checkbox"/> | Outreach to special populations <input type="checkbox"/> |
| Information tables at fairs, festivals, or other such community settings <input type="checkbox"/> | Advisory committee meetings <input type="checkbox"/> |
| Community briefings <input type="checkbox"/> | Other (please specify): _____ <input type="checkbox"/> |

Lessons for future implementors:

- **For toolkit revisions**
 - Consider tailoring questions by commonly used project phases, like planning, design, and construction, to ease customization.
 - Explore an automated process for downloading the survey results into the scoring tool.
 - Move the demographic questions to the end of the survey to encourage survey completion.
 - Provide some analysis on the questions that should be customized based on research findings. Determine if removing those data points minimize the overall scoring tool and the subsequent findings as a whole.
 - Users should maintain documentation of how they revise and use the survey tool over time.

- **For implementation by DOTs**
 - Use public comment and virtual engagement tools compatible with toolkit.
 - Engage researchers and public engagement staff who will support data entry and using the scoring tool early in training and implementation process.
 - Provide guidance to your team on timing of using survey instrument – is it okay to provide as a follow-up survey after the public comment period has closed?
 - Provide guidance to your team on how often is too often to survey yourself internally.

APPENDIX – TRAINING MATERIALS OVERVIEW

PRR created a companion training guide that includes updated versions of the training documents used during the DOT trainings in Task 5. This guide is designed to be both an introduction for people who are new to using the toolkit that can be followed in order and a reference for people who are in the midst of using the toolkit who can jump to the section where they seek clarification or direction. The training guide includes the following documents:

1. Factsheet
2. Report 905 Summary
3. Training Presentation
4. Survey Instrument
5. Toolkit Components
6. Implementation Memorandum
7. Scoring Tool Guidelines
8. Survey Scoring Tool
9. Test Data
10. Public Involvement Scenario Description
11. Public Involvement Scenario Scores
12. Public Involvement Plan Adjustment Template