## Rebranding TCAPP to PlanWorks

SHRP 2 Capacity Project C37

**Rebranding TCAPP to PlanWorks**

SHRP 2
STRATEGIC HIGHWAY RESEARCH PROGRAM

TRANSPORTATION RESEARCH BOARD
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SHRP 2 Capacity Project C37

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STRATEGIC HIGHWAY RESEARCH PROGRAM
*Accelerating solutions for highway safety, renewal, reliability, and capacity*

TRANSPORTATION RESEARCH BOARD
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**TRANSPORTATION RESEARCH BOARD**
Washington, D.C.
2014
www.TRB.org

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# Rebranding TCAPP to PlanWorks

## Project No. C37

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October 2013

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## EXECUTIVE SUMMARY

The Burns & McDonnell team was selected to develop a marketing plan for the tool known as Transportation for Communities—Advancing Projects through Partnerships (TCAPP) as part of the second Strategic Highway Research Program (SHRP 2), Capacity Project 37 (C37).

This white paper reviews market research associated with rebranding and presents the research team's conclusions about rebranding. Additionally, marketing information developed as a part of C37 is presented in the appendices. The conclusions presented, which are consistent with the AASHTO assessment workshop conclusions, may help inform future improvements to, or the marketing of, TCAPP.

Note that, for the purposes of this white paper, the consultant team refers to the tool by its current name, TCAPP.

**Background**

TCAPP is a web portal designed to support collaborative decision making in the transportation planning and project development process. TCAPP is one of many tools developed through the SHRP 2 charge authorized by Congress.

*While the scope of the project evolved over time, it has been clear that **the name TCAPP does not communicate well** and most stakeholders, **even from the earliest interviews, have suggested that a rebranding effort should be undertaken.***

In late 2012, with the research and development phase of TCAPP substantially completed, the Standing Committee on Planning (SCOP) of the American Association of State Highway and Transportation Officials (AASHTO), with support from the Federal Highway Administration (FHWA) and the Transportation Research Board (TRB), directed AASHTO staff to develop an assessment process to better understand the *usefulness, usability and longevity* of the TCAPP tool. Through this process, it was determined that the name TCAPP should be rebranded.

**Conclusions**

Multiple names, tag lines, logos, and color palette combinations were developed as part of the C37 rebranding effort for TCAPP. These brand elements were evaluated using a three-pronged approach: (1) comparison of elements against specific branding criteria; (2) feedback from a broad range of stakeholders; and (3) consultant team review for future marketing potential. This report offers the following conclusions:

*Branding is **part science and art**. That's why a **three-pronged approach** was used to evaluate options. **The survey results are only intended to provide feedback**—results are not scientific, but they reinforce that both **PlanWorks** and **Project Planning Advisor** are **solid branding options.***

- The TCAPP name is not well supported using the branding criteria, stakeholder feedback, or consultant review.

- While the name Navigator is well supported using the branding criteria, it is not as well supported based on stakeholder feedback and consultant review, given the relatively larger negative reaction to the name.

- The name Project Planning Advisor doesn't fare as well using the branding criteria, but is well supported by the stakeholder feedback. The consultant review is not as positive, because the name is likely to be converted to an acronym and describes the function of the tool rather than being a stand-alone name. However, this is a solid option.

- PlanWorks is well supported using the criteria and based on stakeholder feedback and consultant review. Two tag-line options were evaluated, and the consultants think "Better planning. Better projects" is simpler, more memorable, and has better cadence than "Partnership for better projects." The consultants also see strong marketing potential in this name.

- While the "energy and efficiency" color palette is most strongly supported, the consultant team concludes that both the "energy and efficiency" and "bold action" color palettes provide strong visual interest. However, the team also recognizes the value of the "simplicity and sophistication" palette in coordinating well with other FHWA communication tools.

Following are graphs that summarize stakeholder feedback regarding branding concepts. This feedback was gathered via hard-copy and electronic survey. Respondents were asked to rate their impressions of names, tag lines, and logos on a scale of 1–10. A rating of one represented the most negative impression and a rating of 10 represented the most positive impression.

| | Mean | Negative | Neutral | Positive |
|---|---|---|---|---|
| **TCAPP** *Planning better projects* | 4.5 | 49% | 22% | 30% |
| **Navigator** *Planning better projects.* | 5.4 | 34% | 12% | 53% |
| **PlanWorks** *Better planning. Better projects.* | 5.9 | 23% | 21% | 56% |
| **PlanWorks** *Partnership for better projects.* | 5.8 | 26% | 23% | 51% |
| **Project Planning Advisor** *Better decisions. Better delivery.* | 5.8 | 24% | 17% | 59% |
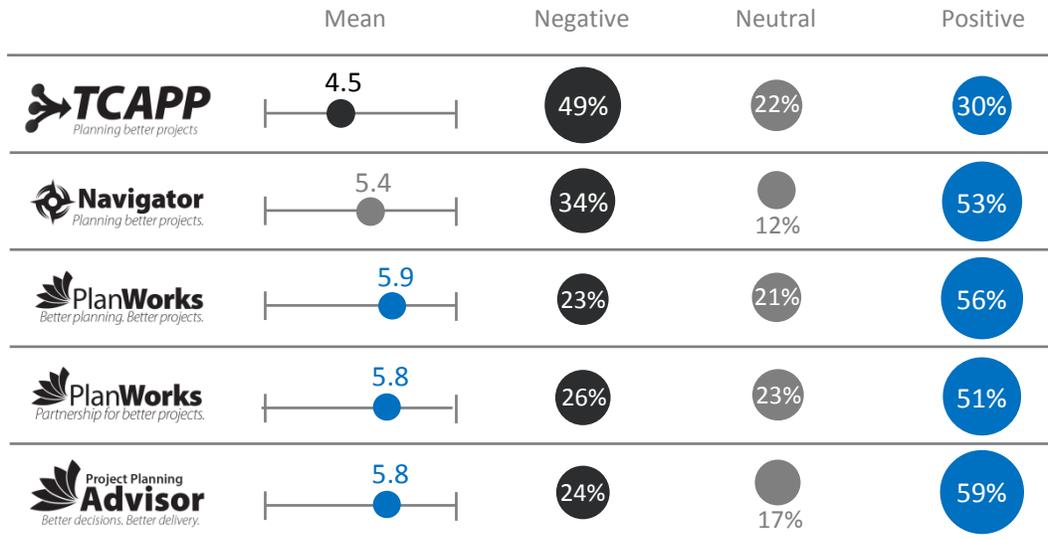
**Figure ES.1. Overall Stakeholder Survey Results**
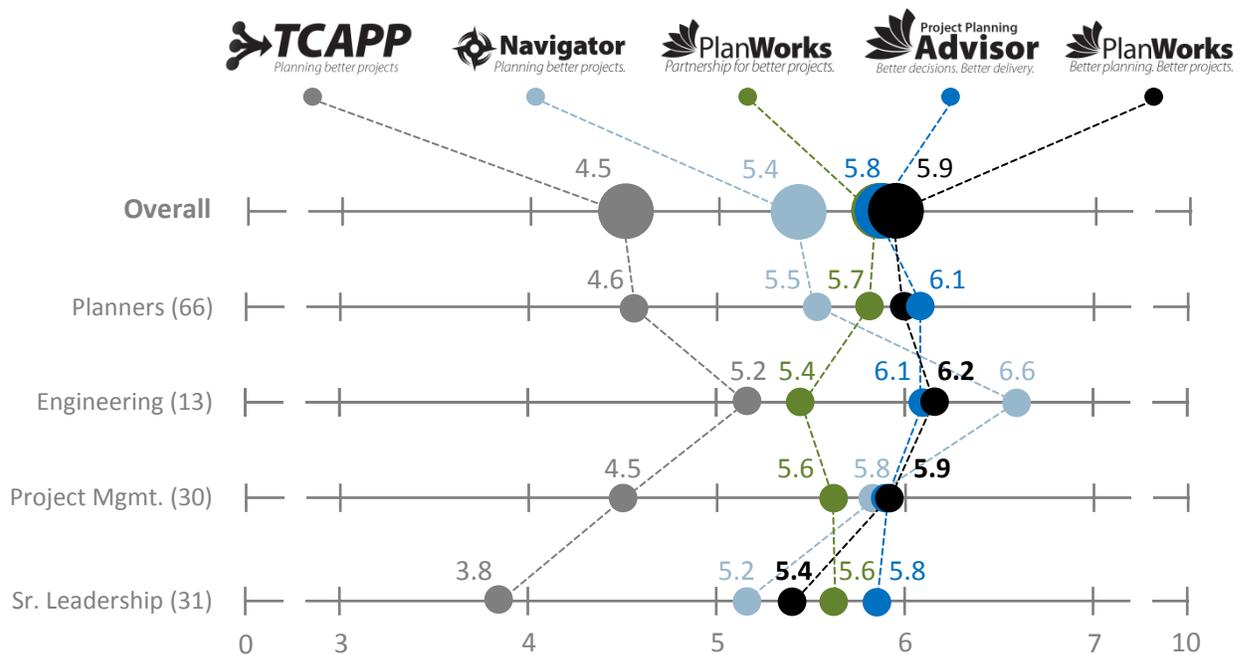


**Figure ES.2. Stakeholder Survey Results on Proposed TCAPP Concepts by Job Function**

| | Mean | Negative | Neutral | Positive |
|---|---|---|---|---|
| Energy & Efficiency | 5.3 | 35% | 18% | 48% |
| Simplicity & Sophistication | 4.3 | 52% | 20% | 28% |
| Bold Action | 5.0 | 40% | 18% | 42% |
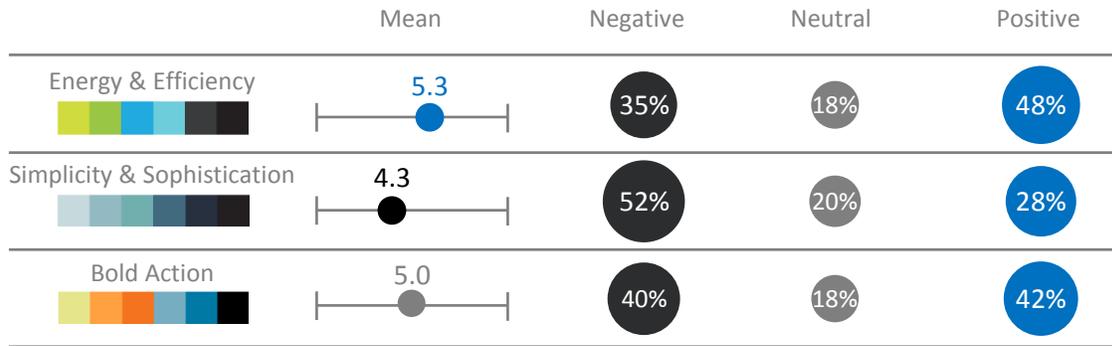
**Figure ES.3. Stakeholder Survey Results on TCAPP-Proposed Color Palettes**

## MARKET RESEARCH

The initial C37 research project was designed to deliver a comprehensive marketing plan for TCAPP. In the early phases of the project, the consulting team conducted a series of market research activities related to marketing TCAPP, including an examination of whether TCAPP should be rebranded. Those early market research activities included

- Interviews of key stakeholders and electronic surveys of organizations that would likely be interested in TCAPP (Summer 2012)
- Two focus groups (Fall 2012)

In late 2012 and early 2013, it was decided that the TCAPP tool should be broadly assessed in terms of usefulness and usability. The consultant team helped design and facilitate the AASHTO-sponsored TCAPP assessment workshops in spring 2013. One of the key conclusions of those workshops was that TCAPP needed to be rebranded. The C37 consultant team was charged with taking on a more comprehensive rebranding effort and worked closely with a core group of representatives of SHRP 2, AASHTO, and FHWA. That core group provided significant input and worked together to develop the set of branding options that are presented in this white paper.

## 1.1    Initial Market Research

To gather background information on TCAPP and shape the focus group discussion, the consultant team conducted telephone interviews with the key stakeholders listed below. The telephone interviews were structured to learn more about the original purpose of TCAPP, how the tool evolved over time, likely user groups, and potential marketing strategies.

*SHRP 2/TRB/FHWA*
- Stephen Andrle, SHRP 2
- Linda Mason, SHRP 2
- Neil Pedersen, SHRP 2
- Dave Plazak, SHRP 2
- Shari Schaftlein, FHWA
- Gloria Shepard, FHWA
- Spencer Stevens, FHWA

*Contractors for SHRP 2 Work*
- Beverly Bowen, ICF International
- Janet D'Ignazio, ICF International
- Mary Beth Hines, Volpe National Transportation Systems Center
- Benjamin Irwin, Volpe National Transportation Systems Center

- Elizabeth Sanford, Cambridge Systematics

*Pilot Study Participants*

- Craig Casper, Transportation Director, Pikes Peak Area Council of Governments
- Robin Mayhew, Program Manager, Puget Sound Regional Council
- Matt Shands, Minnesota Department of Transportation (DOT)
- Shuming Yan, Deputy Planning Director, Urban Planning Office, Washington State DOT

Based on the early interviews, the team noted, *"There's a big problem with the name 'TCAPP.' It doesn't make it clear what TCAPP does."*

*Potential Users/Critical Audiences*

- Matt Hardy, Program Director for Policy and Planning, AASHTO
- Carol Legard, Transportation Liaison, Advisory Council on Historic Preservation
- Rich Denbow, Director of Technical Programs, Association of Metropolitan Planning Organizations (AMPO)
- Rich Perrin, Executive Director, Genesee Transportation Council (Metropolitan Planning Organization [MPO])
- Rob Quigley, State Project Management Engineer, Florida DOT
- Lauren Diaz, Program Manager/National Transportation Liaison, U.S. Army Corps of Engineers
- Roberta Gerson, Regional Transportation Coordinator, Sacramento, CA; U.S. Fish and Wildlife Service (FWS)

The research team also sent an electronic survey to members of organizations with ties to TCAPP (e.g., SHRP 2 state coordinators, Local Technical Assistance Program [LTAP] leaders, and TRB committees). The survey invited participants to offer their feedback on TCAPP. It focused on how to engage people who were not familiar with the tool and assessed the value of TCAPP to frequent users. Respondents were encouraged to forward the survey link on to their colleagues. Nearly 200 people responded, helping to build the TCAPP users' database and the focus group recruitment pool. Additional information gathered from the interviews and survey results are summarized in Appendix A.

## 1.2     Focus Group: Branding Discussion

As a part of C37, two focus groups were assembled to explore how to best market TCAPP. A total of 17 practitioners involved in transportation planning, National Environmental Policy Act (NEPA) compliance, engineering, and public engagement were brought together on September 12 and 13, 2012, to explore and test:

- How practitioners experience TCAPP and how those experiences translate to words that resonate for marketing TCAPP; and

- Possible definitions of TCAPP, along with potential brand look and feel, name, and tag line, should the decision be made to rename and rebrand TCAPP.

A summary of the focus groups' branding discussion is provided below. Appendix B contains the full report of the focus group findings.

### Look and Feel of TCAPP Website

Focus group participants chose several words to describe the look and feel of TCAPP. These words represent how the website should resonate with users when they're visiting TCAPP. Participants mostly preferred words that focus on a website that is easy to use and practical—the website needs to give the user what they're looking for when they're looking for it.

**Focus Groups: Words that Resonated vs. Words that did not Resonate**

| | RESONATE | DID NOT RESONATE |
|---|---|---|
| **LOOK** | Clean<br>Sharp<br>Clear<br>Simple<br>Bright | Complex<br>Bold |
| **FEEL** | Flexible<br>Real World (case studies)<br>Practical<br>Comprehensive (guide)<br>Efficient (navigation)<br>Traditional yet modern<br>Fresh (up-to-date) | Social<br>Problem Solver |

**Figure 1.1. Focus Groups: Words that resonated vs. words that did not resonate.**

### TCAPP Definition

Focus group participants identified TCAPP as a comprehensive resource guide most likely to help younger to mid-level transportation planning professionals. They cautioned against overselling TCAPP as a problem-solving tool and reiterated TCAPP's benefit as a reference. Participants were concerned with the credibility of any product that says it can deliver something but then does not actually deliver it in practice.

After using TCAPP, participants stated that they liked viewing the overall planning process on one site and seeing how the various planning pieces and processes integrate. Many concluded that the site provides a good outline for practitioners to follow for smoother project delivery.

Participants were asked to brainstorm definitions for TCAPP. Many emphasized shorter definitions, since lengthy responses don't keep people's interest (both verbally and in text). Several groups identified similar words when creating definitions:

- GUIDE (what the website is)
- EXPERIENCES (what the website contains)
- TRANSPORTATION PLANNERS (who the website is for)

Focus group members modified existing definitions provided by the project team. One of the provided definitions included the language "decision support tool" and many groups initially worked from this phrase. However, after using the tool, both focus groups agreed that TCAPP was more of a reference tool and did not meet some users' expectations that TCAPP could solve their planning-related challenges. As a result, "guide" and "reference" were words more commonly used to describe TCAPP.

### Table 1.1. Focus-Group Developed TCAPP Definitions

**TCAPP IS . . .**

a comprehensive **GUIDE** that walks you through **EXPERIENCES** and decisions of **TRANSPORTATION PLANNERS** and stakeholders. Real-world projects and challenges show the steps to make better, more informed decisions.

a planning support tool built from the **EXPERIENCES** of transportation partners and stakeholders for collaboration, for getting projects and plans done better, cheaper, and faster.

your practical decision support tool built from **EXPERIENCES** of transportation professionals that provides the how-to for **TRANSPORTATION PLANNING** challenges through the use of checklists, adaptable documents, step-by-step strategies, and supportable results.

a decision support tool, built from the **EXPERIENCES** of transportation partners and stakeholders, providing how-to information when it is most needed.

*TCAPP Names and Tag Lines*

After identifying words and definitions that describe TCAPP, the focus group participants looked at the names and tag lines that could replace and/or enhance the TCAPP brand. Participants stressed their contention that tag lines, like the definitions, need to be short and explanatory; both the name and tag line should give the user a clear sense of what the website does while enticing users to visit.

### Table 1.2. Focus Groups: Names and Tag Lines

| Names | Tag lines |
|---|---|
| Ike | Transportation Planning @ Its Best |
| Ike | Integrating knowledge and experience |
| PlanGuide | Share ideas. Deliver projects. |
| Planning Yard | Faster projects. Better results. |
| TranspoToolbox | Go plan it! |

### 1.3    AASHTO Regional Assessment Workshops

In late 2012, with the research and development phase of TCAPP substantially completed, the Standing Committee on Planning (SCOP) of the American Association of State Highway and Transportation Officials (AASHTO), with support from the Federal Highway Administration (FHWA) and the Transportation Research Board (TRB), directed AASHTO staff to develop an assessment process to better understand the *usefulness, usability, and longevity* of the TCAPP tool.

> *The C37 rebranding efforts during the summer of 2013 were informed by and built upon the focus group work conducted in the fall of 2012.*

To assess the usefulness and usability of the TCAPP tool, more than 140 people participated in workshops conducted in each of the four AASHTO regions:

- Minneapolis-Saint Paul, Minnesota: April 2–3, 2013 (AASHTO Region 3)
- Seattle, Washington: April 24–25, 2013 (AASHTO Region 4)
- Atlanta, Georgia: April 29–30, 2013 (AASHTO Region 2)
- Washington, D.C.: May 20–21, 2013 (AASHTO Region 1)

Representatives of 37 DOTs and 21 Metropolitan Planning Organizations (MPO) participated in two-day workshops. The first day of the workshop was dedicated to training participants how to use TCAPP, while the second day of the workshop focused on applying and assessing the usefulness and usability of TCAPP.

*Key Conclusions from the TCAPP Assessment*

Generally, participants found TCAPP to be a good resource and found that its depth of content added value. Participants generally expressed a favorable impression of TCAPP and the majority of participants said that they would use TCAPP in the future. However, while TCAPP contains good information, the way the information is presented to users needs to be improved. Key improvements identified by workshop participants are summarized into six main conclusions:

> *Rebranding TCAPP was one of the top six conclusions from the AASHTO workshops.*

- Make it a tool—As currently configured, TCAPP is a resource library. Workshop participants want it to be a tool.
- Upgrade the site design—The design, look, and feel of TCAPP needs to be updated and improved.
- Improve content—TCAPP content needs to be improved before it is implemented. Improvements could range from minor edits and terminology clarifications to expanded content.
- Transition to a host to maintain TCAAP over the long term—TCAPP requires a long-term home with an agency that has the commitment and capacity to maintain it.
- Train potential users—Training is needed in order to effectively use TCAPP, though the TCAPP website should also be made more intuitive to reduce the need for training.
- **Rebrand TCAPP—TCAPP needs to be rebranded with a name that more clearly describes the purpose of the tool.**
  - The current name does not resonate with potential users. Participants universally agreed that the current name, which is Transportation for Communities— Advancing Projects through Partnerships (TCAPP),  does not describe the product. The word "communities" was confusing to many; "advisor," "decision," accelerator," "guidance," and "planning/program/project" resonated better.
  - TCAPP's value and purpose is not clearly communicated by the current website**.** Participants identified a number of ways that TCAPP adds value, including creating a transparent framework, clarifying role and expectations, providing a method for proactively identifying risks and potential issues, and bringing consistency and credibility to the planning process. These statements of TCAPP's value need to be clearly articulated and used in the marketing of TCAPP to other potential users.

* * * * *

## 2.0    BRANDING METHODOLOGY

### 2.1    Branding Criteria

The research team developed a set of draft brand criteria to evaluate potential names for TCAPP and submitted that criteria for review by the core group of TRB, AASHTO and FHWA representatives. To maximize TCAPP's effectiveness, the brand should follow the criteria below:

**Table 2.1. TCAPP Branding Criteria**

| CRITERIA | DEFINITION |
|---|---|
| Understandable | Brand's wording/images have to make sense to users |
| Relatable | Should establish a connection with various audiences |
| Inspiring | Brand provokes interest among audience in exploring and staying engaged |
| Visual | Brand should rely on images as well as words |
| Memorable | Brand has to be easily recognizable and distinctive so it is remembered |
| Cohesive | Logo and tag line should work together |
| Beneficial | Conveys the purpose and benefits of using TCAPP |
| Delivered in short and simple way | Branding—by definition—is concise |
| Welcoming | Brand should help TCAPP be approachable for the audience |

In addition to the criteria listed above, the research team also suggested that potential future names be reviewed for online "searchability" (e.g., not so overused that the new website would be unlikely to be found through a search engine) and that logos be easily reproducible on various materials and in both color and black and white.

## 2.2 Branding Definitions

Below is the list of brand element definitions the consultant team employed during the rebranding effort.

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**Table 2.2. TCAPP Brand Definitions**

</div>

A **BRAND IDENTITY** INCLUDES

✓ The **name**, the **creative symbol**, the **typeface**, **color palette,** and **tag line**—all come together to create a brand image for everyone who will interact with this brand. Each one of those facets individually is part of the TCAPP brand—and all of them come together to solidify the brand.

✓ The brand is what sets this resource apart from any and every similar resource. Every user who sees and interacts with these brand pieces will begin to connect those pieces with the actual TCAPP resource, so when branded well, the brand helps the user remember and connect with TCAPP.

THE **NAME** SHOULD BE

✓ Short, easily recognizable and distinctive, so it is memorable. It also needs to be relatable to each of its audiences, so they can connect with the name and associate it with the resource.

✓ Within the marketing arena, names that cannot be shortened to an acronym are preferred.

THE PURPOSE OF THE **TAG LINE** IS TO

✓ Sum up what the user can expect from the brand. It is the positioning statement. The tag line tells the user what TCAPP promises to do for them.

THE **BRAND UTILITY** IS IMPORTANT TO CONSIDER

✓ Keep in mind users will be interacting with this resource differently, so it's important to try to not land on a name that promises to be all things to all users, within one name. Otherwise, the name becomes too lengthy and the name loses a great deal of impact and recall.

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## 3.0     BRAND DEVELOPMENT

### 3.1     Initial Name Concepts

The research team evaluated more than two dozen potential names, based on the brand criteria, and discussed the options with TRB, AASHTO, and the FHWA representatives. As a result of this review, the following four names and tag lines were initially presented by the research team. Each includes an explanation of why the concept was suggested.

*Throughout the creative process, the consultant team conducted a preliminary fatal-flaw analysis for trademark conflicts on each of the potential names. They weighed conflicts based on the level of similarity and whether other trademarked products were in similar industries.*

*It's worth noting that almost any name is likely to have trademark conflicts at some level. For example, TCAPP is currently in use by a nonprofit organization, and TCAP is the public school assessment test in Colorado.*

*Option 1*
*Go Plan It! The project planning accelerator*
*Score 8/9 (see Table 3.1 on page 17)*

Based on the outcomes of the external research on the current "TCAPP" product and the criteria for selecting a brand going forward, "Go Plan It! The project planning accelerator" was the research team's top rated brand identity and tag line initially.

The team observed that "Go Plan It!" delivers on the research, is everything this product should embody, and nothing it shouldn't. It is inspiring, active, and memorable. It is enthusiastic without being overbearing. "Go Plan It!" is successful in three different ways:
- Implied empowerment: With this product you have the tools you need for your project; now, go plan it.
- Implied movement/momentum: This is the transportation planning product, the *Go* Plan it.
- Implied breadth: A comprehensive resource in the world of transportation planning—The Go "*Planit*"

The tag line "The project planning accelerator" was designed to complement the name. It continues the theme of movement/momentum for the brand by using the word "accelerator," and it focuses the audience on the task at hand:  planning.

Finally, the name and tag line are approachable, memorable, and easy to articulate. This brand holds up even in colloquial conversation where other brands may be nicknamed or given acronyms for ease of use.

"Go Plan It!" met 8 out of 9 branding criteria ("visual" identity had not yet been created) as shown in Table 3.1 on page 17. However, this name and tag was ultimately eliminated because it was deemed to

have fatal flaws due to trademark conflicts, and the name would be confused with something sounding like "Go Planet".

*Option 2*
*PlanWorks: The project planning accelerator*
*Score 8/9 (see Table 3.1 on page 17)*

After factoring in all of the evaluation criteria and external research, the brand identity "PlanWorks" provides an approachable, relatable name that is easy to understand. This brand also works on more than one level for the audience:

- Implied effectiveness: This plan works. It is proven to work.
- Implied action: This tool works for you.
- Implied service: This is a planning tool for public works.

The tag line "The project planning accelerator" is paired with this brand identity for similar reasons to the "Go Plan It!" brand. It underscores the action and momentum implied in the brand.

*Option 3*
*Plan Advisor: Your total planning resource*
*Score 6/9 (see Table 3.1 on page 17)*

The brand identity "Plan Advisor" provides a concise, straightforward, and simple understanding of the product. While it may not be an inspiring brand name, it is designed to be clear and understandable. This name addresses the feedback received from some focus group and assessment workshop participants.

One concern and a word of caution with a brand so straightforward: it may be so pedestrian that it lacks energy and may not attract interest or enthusiasm, which is a hallmark of a successful brand identity.

The tag line "Your total planning resource" is intended to give the brand a more approachable feel by implying ownership among the audience. It is also reassuring the audience that this product is a comprehensive tool for the planning process.

*Option 4*
*TCAPP: Better planning—better delivery*
*Score 1/9 (see Table 3.1 on page 17)*

For those familiar with the product, TCAPP has become an acronym unto itself—not unlike the way the restaurant chain formerly known as Kentucky Fried Chicken is now simply KFC. Both examples have an

original name that is now less desirable. For TCAPP, the original name (Transportation for Communities—Advancing Projects through Partnerships) is lengthy and difficult to articulate.

The consulting team included TCAPP as an option for consideration because it is the current brand and a known quantity among some of the audiences. Its name recognition has value that should not be overlooked, but recent research shows that many users providing feedback have a negative association with the name.

This brand identity fails several of the brand criteria, and the market research indicates that the TCAPP name is confusing. As the planning product itself is revised to better serve the target audience, there is also an opportunity to rebrand with a name that is more effective and welcoming.

The tag line "Better Planning—Better Delivery" is designed to deliver a simple, clear "improved planning" message to the audience.

TCAPP meets 1 out of 9 branding criteria. It is short and simple, but not understandable, relatable, inspiring, memorable, cohesive, beneficial, or welcoming. See Table 3.1.

**Table 3.1. Initial Proposed Names Compared to Evaluation Criteria**

| Branding Criteria | Understandable | Relatable | Inspiring | Visual | Memorable | Cohesive | Beneficial | Short and Simple | Welcoming |
|---|---|---|---|---|---|---|---|---|---|
| **Go Plan It!** *The project planning accelerator* | ☑ | ☑ | ☑ | N/A | ☑ | ☑ | ☑ | ☑ | ☑ |
| **PlanWorks** *The project planning accelerator* | ☑ | ☑ | ☑ | N/A | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Plan Advisor** *Your total planning resource* | ☑ | ☑ | | N/A | ☑ | ☑ | ☑ | ☑ | |
| **TCAPP** *Better planning – better delivery* | | | | N/A | | | | ☑ | |

## 3.2    Refining Name and Tag Lines Concepts

TRB, AASHTO, and FHWA core team members provided feedback on names provided in Table 3.2. Team members requested a few options that included project in the name. Team members also expressed a desire for names that cannot easily be turned into acronyms. In response to that feedback, the consultant team developed the revised names and assessment presented below.

**Table 3.2. Revised Proposed Names Compared to Evaluation Criteria**

| Branding Criteria | Understandable | Relatable | Inspiring | Visual | Memorable | Cohesive | Beneficial | Short and Simple | Welcoming |
|---|---|---|---|---|---|---|---|---|---|
| **Compass** *Planning better projects* | ☑ | ☑ | ☑ | N/A | ☑ | ☑ | ☑ | ☑ | ☑ |
| **ProjectPlanner** *Better decisions— better delivery* | ☑ | ☑ | | | ☑ | ☑ | ☑ | ☑ | |
| **Project Navigator** *Better decisions— better delivery* | ☑ | ☑ | | N/A | ☑ | ☑ | ☑ | | ☑ |
| **Project Planning Advisor** *Better decisions— better delivery* | ☑ | ☑ | | N/A | | ☑ | ☑ | | |
| **PlanWorks** *Better decisions— better projects* | ☑ | ☑ | ☑ | N/A | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Plan Advisor** *Planning better projects* | ☑ | ☑ | | N/A | ☑ | ☑ | ☑ | ☑ | |
| **TCAPP** *Better decisions— better delivery* | | | | N/A | | | | ☑ | |

On July 30, 2013, the refined name and tag line options were presented via conference call to the SHRP 2 C37 Technical Expert Task Group (TETG) panel members for reaction. Those participating in the call or providing comments after the call included: Matt Shands, Minnesota DOT; Deb Nelson, New York DOT; Mike Horton, Fish and Wildlife Service; Barry Seymour, Delaware Valley Regional Planning Commission; and Jacky Grimshaw, Center for Neighborhood Technology. Their comments are summarized as follows:

### Table 3.3. TETG Project Name Feedback

**COMPASS: PLANNING BETTER PROJECTS**

- ✓ Can be constructed to mean lots of other things
- ✓ Like but recognize the difficulty with  Internet searches
- ✓ Like the tag line and that it meets all the branding criteria
- ✓ Like simplicity of Compass
- ✓ Implies straight line from A to B
- ✓ Several states use Compass in long-range plans (examples: North Carolina and California)

**PROJECT NAVIGATOR: BETTER DECISIONS—BETTER DELIVERY**

- ✓ Preference for this name—like the implication that it helps people navigate the process
- ✓ Too project-focused, suggest remove "project" and just use "Navigator"
- ✓ Like Navigator—like simplicity
- ✓ Implies more of a partnership
- ✓ Implies there are bends in the road that you might have to navigate—good
- ✓ Like that this implies "we will figure it out as we go"

**PROJECT PLANNING ADVISOR: BETTER DECISION—BETTER DELIVERY**

- ✓ Not memorable

**PLANWORKS: BETTER DECISIONS—BETTER PROJECTS**

- ✓ Suggestion to change it to Planning Works
- ✓ Doesn't resonate
- ✓ Doesn't have oomph
- ✓ Not memorable

**TCAPP: BETTER DECISIONS—BETTER DELIVERY**

- ✓ Even though we love the tool, it needs to be rebranded
- ✓ Don't even know what it stands for sometimes
- ✓ No one indicated preference for keeping TCAPP
- ✓ Want something "sexier"

In the calls following the TETG panel discussion, the core group of TRB, AASHTO and FHWA representatives concluded that the name "Compass" had a fatal flaw because it is so frequently used that its "searchability" is diminished and, in fact, it is frequently used within FHWA. The name "Project Planner" was eventually dismissed because team members thought that name implies a tool that offers scheduling and cost-estimating functions and was too narrowly focused. "Plan Advisor" was eliminated because it was too similar to "Project Planning Advisor."

## 3.3    Applying Graphic Treatment

Additionally, during this time, graphic treatments were applied to these concepts, as explained on the following page.

**Table 3.4. Original Graphic Treatments**

| Graphic | Description |
|---|---|
| COMPASS — Navigating Better Projects | This name was eventually eliminated for a potentially fatal flaw described above. |
| Project Navigator — Better decisions. Better delivery. | A stylized and abstracted design of a compass dial was created. The circular elements represent speed and ease of movement. The four pillars of the compass can represent the four partners described on the current TCAPP site (FWHA, MPOs, Resource Agencies, DOTs). Later feedback removed "Project" from the name and changed the tag to "Planning Better Projects." |
| PlanWorks — Better planning. Better projects. | This is perceived differently by different audiences. One person may see a flower blooming as a visual idea of a project coming to life. The abstract and geometric design takes on the characteristics of a compass dial. The opacity and overlapping colors represent the different entities working together, and some see "pages" of a project plan. |
| Project Planning Advisor — Better decisions. Better delivery. | Using the abstracted flower shape. The petals also represent the steps/milestones involved in a project. The movement of the "petals" upward represents progress. |
| TCAPP — Planning better projects | The dots and arrow are meant to visually represent a dynamic flowchart and the way that TCAPP provides direction and momentum to a project. |

### 3.4    Applying Color Palettes

Once final designs, names, and tag lines were vetted with the core group of TRB, AASHTO, and FHWA representatives, four-color palettes were applied to each concept. A magenta palette was eliminated through feedback from TRB, AASHTO, and FHWA team members. The remaining three palettes follow:

Theme: ENERGY & EFFICIENCY

Theme: SIMPLICITY & SOPHISTICATION

Theme: BOLD ACTION

### 3.5    Final Brand Eler

Through input from TRB, AASHTO, and FHWA team members, five final draft concepts have been produced by the research team. They are as follows:

**Figure 3.2. Final draft concepts of brand elements.**

The consulting team evaluated the final draft concepts using the branding criteria and results are provided below:

**Table 3.5. Final Draft Concepts Compared to Evaluation Criteria**

| Branding Criteria | Understandable | Relatable | Inspiring | Visual | Memorable | Cohesive | Beneficial | Short and Simple | Welcoming |
|---|---|---|---|---|---|---|---|---|---|
| **TCAPP** <br> *Planning better projects* | | | | ☑ | | | | ☑ | |
| **Navigator** <br> *Planning better projects* | ☑ | ☑ | | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Project Planning Advisor** <br> *Better decisions— better delivery* | ☑ | ☑ | | ☑ | | ☑ | ☑ | | |
| **PlanWorks** <br> *Partnership for better projects* | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☐ | ☑ |
| **PlanWorks** <br> *Better planning, better projects* | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ | |

Below is each concept with the final three-color palettes applied.



**Figure 3.3. Final draft concepts**

* * * * *

## 4.0    FEEDBACK ON DRAFT FINAL BRAND ELEMENTS

### 4.1    Survey Overview

The consultant team developed an electronic survey to gather feedback on the logos, tag lines, and color palette options. This survey was distributed via e-mail and recipients were allowed a week to complete it. Response rate for the electronic surveys was high, at over 50%. The survey is presented in Appendix C.

The survey was e-mailed out to the following groups:
- AASHTO TCAPP Assessment Workshop Participants
- SHRP 2 Capacity Technical Coordinating Committee (TCC)
- C37 TETG

In addition, a presentation on branding was made at the AASHTO Standing Committee on Planning Summer Meeting to the SHRP 2 Capacity Projects Strategic Planning Workshop. Attendees provided their responses on the same survey in paper form, and consultant team members manually entered the data. The distribution of survey participants is identified in the pie chart below.



**Figure 4.1. Who Participated in Survey**

The survey respondents were asked to self-select their primary job function from the following list:
- Planning

- Senior Leadership
- Project Management/Project Development
- Engineering

Individuals could choose more than one job function. This distribution of survey respondents based on job functions is presented in the pie chart below.

## Primary Job Function
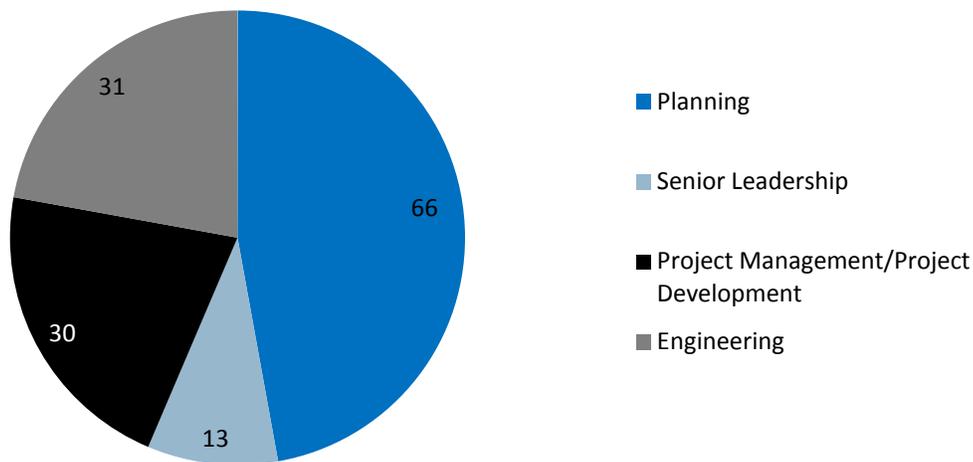


**Figure 4.2. Primary Job Function**

Survey participants were asked to rate their impressions of the five logos and tag lines on a scale of 1–10. A rating of 1 represented the most **negative impression** and a rating of 10 represented the most **positive impression.** Respondents were then asked to look at each of the three color palettes (Energy & Efficiency; Simplicity & Sophistication; Bold Action) paired with each logo and tag line and rate their impressions on the same 1–10 scale.

The consultant team reviewed both the mean score as well as the percent of people who thought the logo/tag line was negative (1–4 ranking), neutral (5 ranking), or positive (6–10 ranking).

## 4.2     Overall Survey Results

Overall survey results are provided on the following page.

**Table 4.1. Stakeholder Survey Results on Proposed TCAPP Concepts**

| | Mean | Negative | Neutral | Positive |
|---|---|---|---|---|
| TCAPP *Planning better projects* | 4.5 | 49% | 22% | 30% |
| Navigator *Planning better projects.* | 5.4 | 34% | 12% | 53% |
| PlanWorks *Better planning. Better projects.* | 5.9 | 23% | 21% | 56% |
| PlanWorks *Partnership for better projects.* | 5.8 | 26% | 23% | 51% |
| Project Planning Advisor *Better decisions. Better delivery.* | 5.8 | 24% | 17% | 59% |
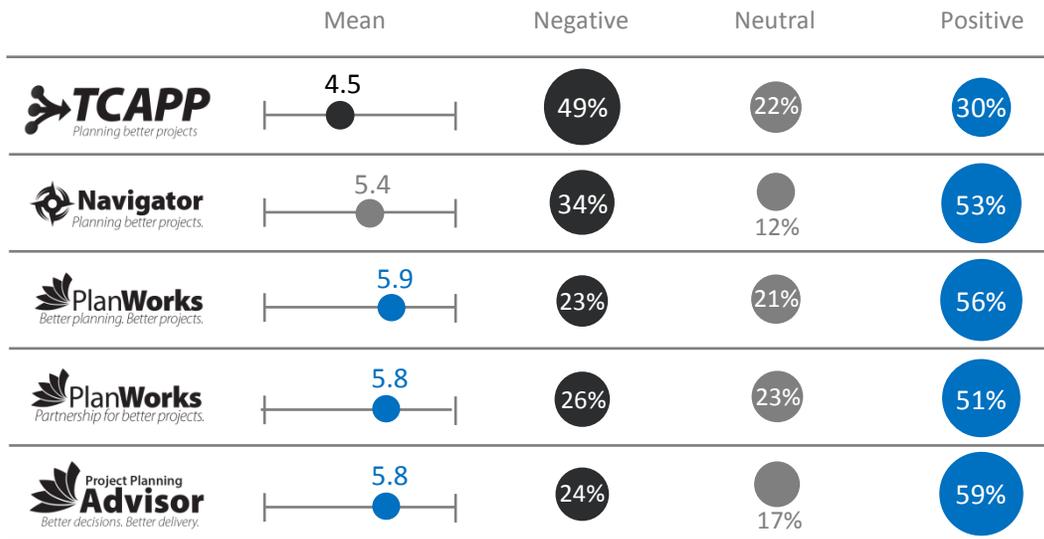
Observations:

- **PlanWorks: Better planning. Better projects** received the highest mean score (5.89).

- **Project Planning Advisor: Better decisions. Better delivery** had the highest positive impression percentage (59.05%).

- In both the mean score and positive impression results, **PlanWorks: Better planning. Better projects** and **Project Planning Advisor: Better decisions. Better delivery** were closely rated.

- In both the mean score and positive impression results, **TCAPP: Planning better projects** was the least popular.

- As for the most "polarizing" logo and tag line, **Navigator: Planning better projects** had both a high positive impression percentage ranking (53.33%) and a high negative impression percentage (34.28%). We define "polarizing" as causing two contrasting positions.

## 4.3    Results Sorted by Job Function

**Table 4.2. Survey Results Based on Survey Respondents' Job Functions**
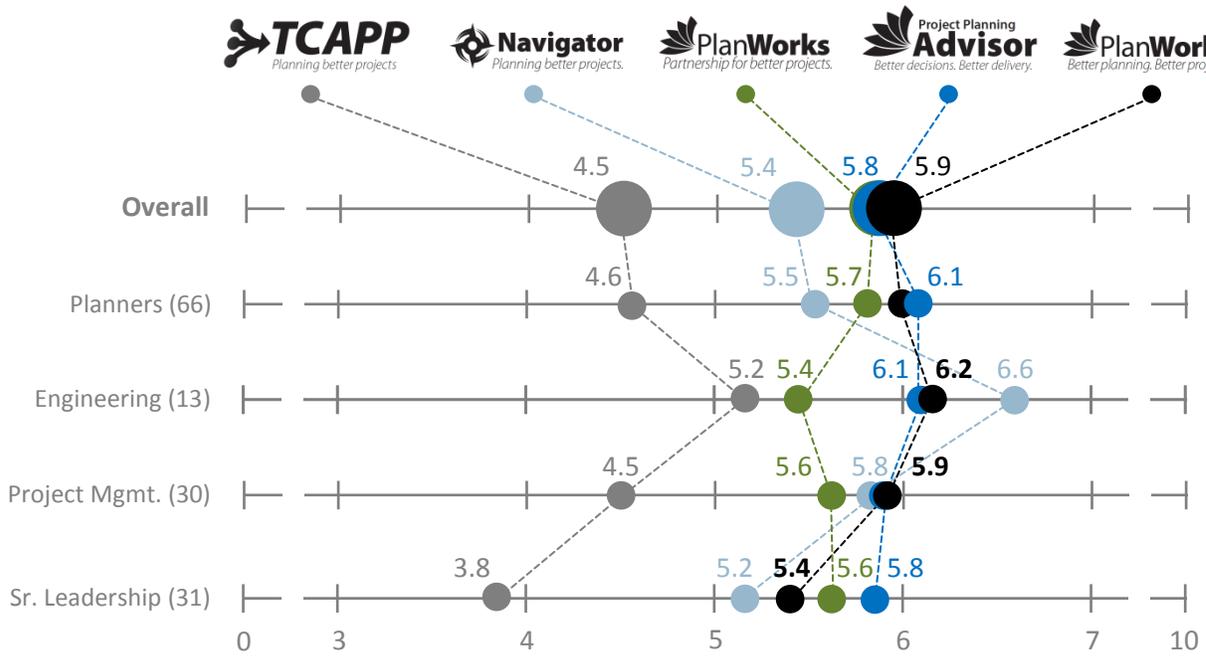


## 4.4    Color Palettes

Survey respondents replied to a series of questions looking at the color palette choices. The findings are below.

**Table 4.3. Stakeholder Survey Results on TCAPP-Proposed Color Palettes**

| | Mean | Negative | Neutral | Positive |
|---|---|---|---|---|
| Energy & Efficiency | 5.3 | 35% | 18% | 48% |
| Simplicity & Sophistication | 4.3 | 52% | 20% | 28% |
| Bold Action | 5.0 | 40% | 18% | 42% |
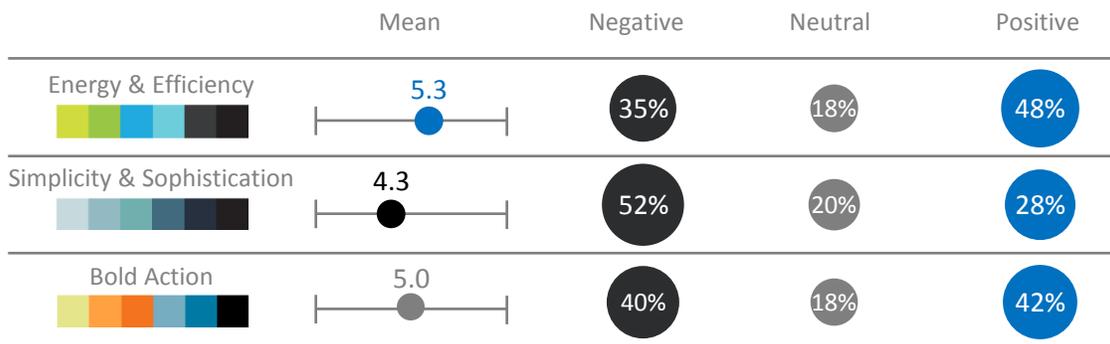
Observations:

- **Energy & Efficiency** received the highest mean score as well as highest positive impression percentage.
- **Simplicity & Sophistication** received the lowest mean score as well as the highest negative impression percentage**.**

*It is important to note that these survey results are not intended to be statistically valid. Specific groups of people were selected to receive a survey based on their experiences or familiarity with TCAPP. So, while the response rate is high for the selected groups, it is not possible to assume that the groups themselves are representative of the larger transportation community. Full survey results are in Appendix D, and narrative comments are provided in Appendix E. Guidance on suggested style is in Appendix F,* and Appendix G is a list of relevant abbreviations and what they stand for.

\* \* \* \* \*

## 5.0    CONCLUSIONS

Multiple names, tag lines, logos, and color palette combinations were developed as part of the C37 rebranding effort for TCAPP. These brand elements were evaluated using a three-pronged approach, including: (1) comparison of elements against specific branding criteria; (2) feedback from a broad range of stakeholders; and (3) consultant team review for future marketing potential. This report offers the following conclusions:

- The TCAPP name is not well supported using the branding criteria, stakeholder feedback, or consultant review.

- While the name Navigator is well supported using the branding criteria, it is not as well supported based on stakeholder feedback and consultant review, given the relatively larger negative reaction to the name.

- The name Project Planning Advisor doesn't fare as well using the branding criteria but is well supported by the stakeholder feedback. The consultant review is not as positive because the name is likely to be converted to an acronym and describes the function of the tool rather than being a stand-alone name. However, this is a solid option.

- PlanWorks is well supported using the criteria and based on stakeholder feedback and consultant review. Two tag line options were evaluated, and the consultants believe "Better Planning. Better Projects." is simpler, more memorable, and has better cadence than "Partnership for Better Projects." The consultants also see strong marketing potential in this name.

- While the "energy and efficiency" color palette is most strongly supported, the consultant team concludes that both the "energy and efficiency" and "bold action" color palettes provide strong visual interest. However, the team also recognizes the value of the "simplicity and sophistication" palette in coordinating well with other FHWA communication tools.

These conclusions are also summarized in Table 5.1.

**Table 5.1. Concept Conclusions**

| | Evaluation Criteria | Survey Feedback Overall (mean score) | Consultant Team Observations |
|---|---|---|---|
| TCAPP Planning better projects | Low | 4.46 | • Not well supported |
| Navigator Planning better projects. | High | 5.41 | • Negative percentages are concerning |
| PlanWorks Better planning. Better projects. | High | 5.89 | • Well supported<br>• Not likely to become an acronym<br>• Team sees strong marketing potential in this name |
| PlanWorks Partnership for better projects. | High | 5.75 | • Not as well supported as other PlanWorks tag line |
| Project Planning Advisor Better decisions. Better delivery. | Medium | 5.8 | • Strong, well-supported option<br>• More likely to have an acronym (PPA) |

# APPENDIX A:

# INITIAL MARKET RESEARCH

**Fundamental Views from Stakeholders: What We Heard**

*What's the primary value of Transportation for Communities—Advancing Projects through Partnerships (TCAPP) for Departments of Transportation (DOTs) and Metropolitan Planning Organizations (MPOs)?*

- TCAPP is a great in-depth **reference guide**.
  - Users can see the overall planning process and how steps relate to each other. [This is the] only place this overview is available.
  - TCAPP is "armchair reading" for planners. The corridor component of TCAPP may be more useful than the long-range planning component—maybe emphasize the corridor tool in marketing.
  - Incorporates lessons learned from 23 projects.
  - TCAPP is a reference for how to do good planning. It helps planners avoid having to reinvent the wheel, or it can be used as a checklist for ensuring that important steps are not missed.

- TCAPP **helps public agencies avoid delays** because it's a **systematic and predictable way of planning projects.**
  - TCAPP offers "a predictable and systematic collaboration process for agencies to navigate project development and get projects done more quickly." But be realistic: TCAPP is not going to cut project development time in half, although it will help avoid delays. Time savings are an important benefit to emphasize. But TCAPP can't guarantee that a project will always be delivered faster or cheaper.
  - A road map for efficient and effective collaboration. Some describe TCAPP as a "Cliff's Notes" product.
  - Comprehensive set of guidelines (really good information).

- TCAPP **increases collaboration.**
  - Method for getting everyone on the same page (i.e., it helps avoid surprises and builds faith among participants).
  - Establishes that collaboration will be a primary function of the planning process.

*Who are the primary targeted users?*
Without question, DOT and MPO staffs were identified as the primary targeted users. Some comments to further segment that group were also provided.

- **DOT and MPO staffs, especially planners and project development staff, are** the primary targeted users of TCAPP.
    - Think about the potential TCAPP audience as including practitioners with either a high, moderate, or limited knowledge about planning. TCAPP will really resonate with the middle group. State-of-the-art practitioners can be advocates.
    - **Aim for agencies that are in the "middle of the pack."** Top-tier agencies are already doing TCAPP. Good for MPOs and DOTs.
    - Planners might be more apt to use TCAPP but **project developers would gain greater benefit.**
    - Planning staff through right-of-way staff.
    - Corridor study team.

- States with **expansion projects**:  states with new roads on new locations or widening existing roads are more likely to be TCAPP users than states that are focused on preservation.

- **Consultants** could be another primary market and should not be forgotten**.**

*How do you **best communicate** with primary targeted TCAPP users?*

A number of traditional and new ideas emerged from the interviews, including:

- Employ the usual channels, including **professional associations and training**:
    - Annual Transportation Research Board (TRB) meeting panel sessions.
    - Association of Metropolitan Planning Organizations (AMPO) and National Association of Regional Councils (NARC) conferences. Note: NARC has a "Transportation Thursdays" email bulletin.
    - TRB webinars.
    - Other important organizations include National Association of Counties (NACO), National League of Cities (NLC), and National Association of Development Organizations (NADO).
- **Better Google search results** are needed so that TCAPP comes up when terms like "corridor planning" are used and the brief search result needs to provide a clear indication of what TCAPP is in search results text.
- Biannual Transportation Planning Applications conference.
- **Articles** in periodicals like *Urban Transportation Monitor*.
- **Endorsements** by American Planning Association (APA), American Association of State Highway and Transportation Officials (AASHTO), and similar organizations would be powerful.

- Incorporate into **graduate school curricula** as a teaching tool.
- Use potential LinkedIn group discussions with key TCAPP users to help increase outreach and education on the values of TCAPP.
- Perhaps purchase **targeted ads** on Facebook and LinkedIn.

*How important are government stakeholders (e.g., resource agencies) to TCAPP's success and why?*

While respondents indicated that resource agency personnel are **very important** because projects can often get hung up in the approval process, resource agency personnel **probably aren't the central users of TCAPP**. Respondents said that it's more important to DOTs and MPOs as users, because resource agencies don't have a vested interest in, or time for, TCAPP. In terms of communicating with resource agencies, respondents pointed out that there are "an infinite number of resource agency folks, so it's hard to communicate with them," and recommended that a **top-down** communication approach would be the **most effective approach**.

1. What are the **best selling points** of TCAPP?
   Respondents reported that there are **multiple selling points** for TCAPP, and each of these selling points is valid to the person who reported it. One of the important aspects of the **focus groups** is to **test the various points and assess which points are most meaningful to broader audiences, under various scenarios.** Some responses duplicated the responses from Question #1 (what's the primary value of TCAPP):
   - TCAPP is not just a website, it is also a process. Offers an "encyclopedia." Think about looking at the 23 "stuck" projects that were used to draw on "lessons learned."
   - It shows the planning process from top to bottom to make more efficient and effective decisions.
   - It recognizes that everyone has a role in the decision process.
   - It helps practitioners know what data to gather for decision makers.
   - It's a portal to broader research. TCAPP is based on 23 case studies. There's $12 million to $15 million in embedded research in TCAPP.
   - Helps users get the right people, at the right time, with the right information to make better decisions.
   - Helps professionals get projects unstuck—or helps avoid getting projects stuck
   - TCAPP does not have an all-or-none philosophy; users can use just a portion (and people need to see that value—and see how to do that).
     - Troubleshooting tool.
   - It provides easy access to research, in that it's on your desktop.

- This is a "how to" reference tool, not a mandate. Emphasize that TCAPP can help by making planning decisions stick, minimizing redos, and building consensus. Lastly, emphasize that it is free! Why spend lots of money on high-priced consultants when the answers are already in TCAPP?
- "We used it and it saved us time and money."
- "We used it and it helped us establish longer term collaborative relationships."
- "We used it and it helped us establish the entire planning process early on."
- Creates a neutral source for information. TCAPP can shorten the overall process for projects, but it may not shorten the long range planning process.
- It's free!

2. What are the **barriers or threats** to greater use of TCAPP?

Every person interviewed indicated that navigating the TCAPP website is difficult and that the breadth, depth and complexity of the information provided can be "overwhelming." Most responses could be categorized into one of seven areas:

- **Hard-to-navigate website** was identified as the top barrier to greater use of TCAPP.
  - Users need to be able to know where they are while moving around the website—and right now, you can't track where you are.
  - Users need to be able to save their settings, so when they return they don't have to start all over again.
  - The stakeholder assessment tools and other kinds of checklists need to be developed or made easier to find.
  - Difficult to start using TCAPP: It can be difficult for users to see themselves in the tool. If users have a specific problem, it's difficult to intuitively figure out where within TCAPP to go for guidance.
  - It wasn't designed with the user interface in mind; rather, it is a systematic organization of process.
  - The search function is very limited.
- The **size and complexity** of the information provided in the TCAPP website is **"overwhelming."**
  - While some respondents said they think TCAPP tries to "be all things to all people," others respondents pointed out that it isn't all things for all people. For example, if a DOT or MPO staffer wants information regarding a funding problem, TCAPP doesn't offer that sort of information.
  - Also, it was pointed out that some respondents have concerns that if TCAPP is simplified, that quality will be lost. Rather, they suggest the focus should be on drawing the audience into TCAPP.
  - One respondent asked whether the programming element of TCAPP is needed, as DOTs and MPOs already know how to program projects.

- **TCAPP doesn't tell a user what to do**; rather, it illuminates the decisions that need to be made and what data the user should gather for those decisions to be made.
  - It's been developed to be nationally appropriate; there are pathways, but no answers.
  - It's a way to get started, but users have to tailor it.
  - For users who come to the site expecting or hoping for answers, the question-driven approach may be difficult too comprehend or seem like too much work to understand, especially given the navigation issues.
- Following TCAPP usually requires some change, and **some users are resistant to change**.
  - Some practitioners already think they do planning well and don't need TCAPP. They'll have to be convinced that there's a better way. There's a natural resistance to change.
- **Other agency challenges** may prevent or reduce the use of TCAPP.
  - Some respondents reported that **practitioners are stretched so thin** that they don't have resources to do business in a new way.
  - Some respondents said that they're interested in picking and choosing what to use from TCAPP. Due to time and staff resource constraints and because what they're doing is already working, unless there's a dramatic problem, they wouldn't use all of TCAPP.
  - Fewer DOTs are building capacity projects that can benefit from TCAPP.
  - This way of focusing on capacity seems outdated. It's a problem that there isn't a strong linkage to **operational strategies**.
- **The name "TCAPP"** was identified as a problem.
  - There's a big problem with the name TCAPP, which doesn't make it clear what TCAPP does.
- There's an **inability to demonstrate TCAPP's effectiveness.**

*Table A.1. Audience profile by organization*

| Who? | Why? | Potential Interest Level? | What Do They Need to Know? | How Do They Receive Information? | What Do We Want Them to Do? |
|------|------|---------------------------|----------------------------|----------------------------------|------------------------------|
| DOTs | Need a framework for project development and delivery that results in fewer projects that get "stuck" in the pipeline | High | TCAPP provides an easy-to-use, systematic, and predictable method of project implementation. | Federal and state directives, professional organizations, technical publications, peer-to-peer | Use TCAPP to inform project development and implementation with given resources. |
| MPOs | Need planning resources that are organized and logical | High | TCAPP highlights the overall planning process and outlines the questions that must be answered to avoid getting stuck. | State directives, community action groups, environmental regulations | Use TCAPP to address long-range transportation needs. |
| Resource Agencies | Want DOTs and MPOs to have clear expectations of permitting processes from the beginning | Medium | TCAPP facilitates collaboration between resource agencies and planning and engineering groups. | Federal and state directives, environmental regulations, requests for information from DOTs, MPOs, and consultants | Use TCAPP to address environmental concerns at the planning level and engage organizations in the permitting process. |
| Local Government | Need a road map to efficiently coordinate with many organizations | Medium | TCAPP encourages efficiency and cooperation throughout all levels of the planning process. | State directives, constituent feedback | Use TCAPP to streamline project delivery from the planning stages. |
| Consultants | Want a guide that outlines key decisions and deliverables, because time is money | Medium | That their clients value TCAPP. | Professional organizations, technical publications, client (DOTs) directives | Use TCAPP as a resource manual to model their own projects after |
| Stakeholders | Want to participate and be heard in their community | Low | TCAPP emphasizes community involvement in transportation decision making. | Local government, neighbors, community action groups, press | Use TCAPP to educate themselves about the planning process |

*Table A.2. Audience profile by responsibility level*

| Who? | Why? | Potential Interest Level? | What Do They Need to Know? | How Do They Receive Information? | What Do We Want Them to Do? |
|---|---|---|---|---|---|
| Directors/ CEOs | Need proven methods for project planning with easy-to-follow blueprints for project delivery | Low | TCAPP provides an overview of the planning process and allows users to dive into the areas that interest them | Government directives | Endorse the use of TCAPP in their organization |
| Project Managers | Need a systematic approach for steering their project through the planning and permitting phases | Medium | TCAPP develops a project timeline to identify problems early and work to resolve them in a timely manner | Directors, professional organizations | Use TCAPP to track projects and address potential challenges |
| Staff | Need resources to resolve project challenges and stay on track for project performance | High | TCAPP highlights case studies where organizations used TCAPP to get their projects through actual and potential hang-ups | Project managers, professional organizations, technical publications, colleagues, and peers | Use TCAPP as a model for working through the planning and permitting process |
| Students | Need introduction to the planning and permitting phases of project development | Medium | TCAPP collaborates with many organizations that are involved in project implementation | Educational and professional mentors, student professional organizations | Use TCAPP to learn about the planning and permitting process |

*Table A.3. Audience profile by function*

| Who? | Why? | Potential Interest Level? | What Do They Need to Know? | How Do They Receive Information? | What Do We Want Them to Do? |
|---|---|---|---|---|---|
| **Planners** | Need an accessible blueprint for planning at large and small scales (overview and detailed action steps) | High | TCAPP outlines the entire planning process with recommendations based on successful case studies | Professional organizations, colleagues and peers, government and organization directives | Use TCAPP as the go-to guide for planning |
| **Engineers** | Want a reference that outlines each step in the planning and permitting process | Medium | TCAPP highlights important milestones and presents questions to be addressed | Professional organizations, colleagues and peers, organization directives | Use TCAPP to steer projects in the right direction |
| **Public Affairs/ Communications Professionals** | Need a framework to communicate the planning and permitting process to stakeholders and involve them in those processes | Medium | TCAPP provides a transparent tool outlining the planning and permitting process | Client directives, professional organizations | Use TCAPP to educate stakeholders about and involve them in the planning and permitting process |
| **Environmental Professionals** | Want an easy-to-follow inventory of the permitting process | Medium | TCAPP defines the timeline for gathering data and completing documentation | Professional organizations, colleagues and peers, government and organization directives | Use TCAPP to coordinate environmental issues and applications |

## Obstacles and Opportunities

Drawing from the interviewee responses, the Burns & McDonnell C37 team has identified several obstacles and opportunities that could hinder or accelerate TCAPP's progress toward becoming the go-to resource for information about transportation planning and project development.

## Obstacles

Currently, the Burns & McDonnell team sees four major obstacles to broader use of TCAPP and the development of a successful strategic marketing plan. Those obstacles include

- *Website navigation is a major concern*: Users want to be able to drop in and out of TCAPP easily and modify the tool for their own use. The top concern noted about TCAPP is that it is difficult to navigate through the different hierarchies and to know where users are in the website. For example, in one pilot, staff did not share TCAPP with stakeholders but generally used it as a behind-the-scenes checklist. However, another group reported actively using the stakeholder checklist at every meeting. **There is a challenge to market TCAPP as a drop-in, easy-to-modify tool given the concerns that have been expressed about the navigation**.

- *No definition of TCAPP*:  There isn't a clear consensus among the developers and partners of TCAPP as to what TCAPP is.  A sample of how interviewees describe TCAPP includes
    - It's not a process—every state has its own process; it's a set of decisions.
    - It's a knowledge transfer system.
    - It's a decision support tool.
    - It's a web tool and a change in business processes which have been in place for a long time and will be difficult and expensive to change.
    - It's like marketing an encyclopedia with easy access, but there's a navigation problem.

    **A unified, easy-to-understand definition of TCAPP is needed to effectively market the product**. The Burns & McDonnell C37 team will develop and test TCAPP definitions with focus groups to assess which are the most compelling. Users need to know what TCAPP is so that they can identify the benefits that flow from TCAPP. **It will be important to cultivate a shared sense of what TCAPP is with existing users and partners. Without a shared sense of what TCAPP is, any potential marketing will be limited by the ambiguity.**

- *TCAPP doesn't address some of today's most pressing challenges.* As the team moves beyond the partner and developer interviews and begins interviewing critical audiences, some of the feedback being heard is that the most pressing problems transportation professionals face go beyond navigating the planning process into resource constraint issues. Critical audiences are saying things like:

  - **Many states don't have extensive expansion programs** due to funding constraints, so professionals are looking for a desktop tool with information to help them understand, select, and implement approaches to better manage travel demand within the existing footprint.

  - Agencies need **to deliver commitments made in the environmental process through construction**. The environmental process includes public outreach and all the collaborative efforts involved in reaching the Record of Decision (ROD) and then continuing those assurances until the project is fully delivered. TCAPP should address the entire process from beginning to end. As one interviewee noted, "Most of my work is now in the design/build environment. Getting to the ROD is an important milestone, but I face potential **legal challenges during construction**. TCAPP stopping at the environmental process doesn't address my most important concerns."

  - **Funding has emerged as a major challenge** that needs to be addressed in the TCAPP process. Uncertainty at both the state and federal levels as to the amount of money, the need for transportation plans to be fiscally constrained, and the unknown impacts of how funding categories will ultimately be configured are just some of the funding issues TCAPP needs to address.

  - Most agencies are faced with delivering **more projects with fewer people**, so TCAPP must be seen as a way to help existing processes work better. There is a real sense that those working in the trenches "don't have time to learn a new process," which is greater than just the typical resistance to change. Much like a political campaign, the marketing plan must educate highly targeted potential users on why it is worth their precious time to learn more about TCAPP.

- *No budget has been set for marketing TCAPP.* The Burns & McDonnell team understands it is not possible to identify the marketing budget today, but that issue needs to be kept in the forefront so that as possible answers begin to emerge, the team can take that information into account. Awareness-building activities and materials, as well as direct user support, will likely be necessary to implement TCAPP to the fullest extent possible, and the Burns & McDonnell team wants to develop a **marketing plan that is practical, not overblown**.

## Opportunities

In addition to obstacles, the team has also identified opportunities for marketing TCAPP that need to be tested with the focus groups. While not all of these ideas may be carried forward into the draft marketing plan, they are presented here to gather the initial reactions from the SHRP 2 Capacity Technical Expert Task Group (ETG C37).

- *Change the name to something that resonates.* The transportation industry is full of acronyms, making it difficult to convey the emotion and benefits of a program or product. The Burns & McDonnell C37 team will develop and test new names and logos with the focus groups to brand TCAPP in a more memorable way that better connects the name to the definition and benefits of TCAPP.

- *Expand the universe of possible users.* While many interviewees indicated that they think TCAPP has a very broad market, the reality is that we're probably talking about less than 1,000 *primary* users of TCAPP from DOTs, assuming each DOT could cultivate 20 primary users. Therefore, the marketing plan **must not be overly DOT-centric**. A few interviewees pointed out that it is important to fully explore MPO, local government, and consultant communication vehicles, because members of these groups could also become primary users.

- *Home in on the most likely users.* For example, a survey respondent indicated that he had found TCAPP less helpful for "seasoned MPO" staff and wondered if staff from smaller MPOs might have a greater benefit from using TCAPP. Testing audiences during the focus group meetings will help identify and prioritize key audience segments so that the marketing plan focuses on the most likely targets.

- *Use actual projects to make TCAPP real.* As interviewees noted, TCAPP is a complex tool and people struggle to translate the concepts in the website to their reality. We must use real projects to show how TCAPP works in action.

- *Build instant TCAPP success stories.* **Turn the projects that served as the model for TCAPP into the first generation of success stories**; this helps to address the problem of having only four TCAPP pilot projects to showcase. According to the interview sources, dozens of projects from around the country served as models for various elements of TCAPP and will provide a deep bench of credible evidence that TCAPP works in the real world, too.

- *Create peer-to-peer advocacy*. Build TCAPP's marketing around the words of actual planners in real MPOs and DOTs who have steered the important aforementioned projects. Use carefully selected quotes, copy, and images to let them tell their peers,

"TCAPP is *my* project." Word-of-mouth endorsement carries great weight among TCAPP's audience and is likely to be far more compelling than theory alone.

- *Use a "problem-to-solution" story arc.* Create positive messages that draw people in, with examples showing typical problems being solved with TCAPP. These storylines relate to potential users in their day-to-day job functions, but showcase how using TCAPP made solving the problem easier.

- *Avoid an "everything but the kitchen sink" approach.* Use the testimony of planners and the story of their projects sparingly; highlight a particular aspect of any individual project rather than overloading readers' minds by making every project a beginning-to-end testimonial.

# APPENDIX B:

# FOCUS GROUP RESULTS

# SHRP 2
# Project C-37
# Draft Focus Group Results

## September 26, 2012

# C-37 Focus Group Summary

## SECTION 1 – INTRODUCTION

As a part of C-37, two focus groups were conducted to explore how to best market TCAPP – Transportation for Communities, Advancing Projects through Partnerships. A total of **17** practitioners engaged in transportation planning, engineering, and public engagement were brought together on September 12 and 13, 2012 to explore and test:

1. How practitioners experience TCAPP and how those experiences translate to words that resonate for marketing TCAPP; and

2. Possible definitions of TCAPP along with potential 'brand' look and feel, name, and tag line should the decision be made to rename and rebrand **TCAPP**.

The goal to recruit practitioners representing a broad cross-section of agencies, geographies, and disciplines was achieved. The list of participants is provided in Appendix **A** and representative verbatim comments are provided in Appendix **B**.

**Focus group**

targeted group interview where responses to a new product are studied to guide marketing efforts and determine the response that can be expected from a larger population

## SECTION 2 – ACTIVITIES

The marketing team designed activities informed by previous market research interviews. Specifically, the team tested, in the following order:

1. Words and attributes, based on descriptions of TCAPP in previous interviews, that were most appealing to practitioners,
2. How the most appealing words and attributes compared to the practitioners' hands-on experiences during the focus group,
3. New ideas for branding, including look and feel, definition, name, and tag line

Results from each of those activities are summarized in subsequent sections of this report.

## SECTION 3 – KEY FINDINGS AND OBSERVATIONS

These findings and observations generally reinforce the work of C-22 and expand upon the findings and implications of the developer, partner, and key audience interviews conducted earlier for C-37.

C-37 Focus Group Summary

**TOP TEN TCAPP MARKETING RECOMMENDATIONS, FINDINGS, AND OBSERVATIONS**

1. **Market TCAPP as a "comprehensive planning resource."** TCAPP is primarily experienced as a comprehensive planning resource guide and it should be marketed as such to planning practitioners.

2. **Keep TCAPP fresh with shared experiences**. TCAPP should give people a reason to return by providing links to articles and encouraging them to share experiences through the user group forum.

3. **Improve TCAPP before marketing it.** Practitioners urged that TCAPP be improved before being marketed or SHRP2 risks visitors not returning to the site. Based on their experience in the focus groups, practitioners described TCAPP as a hard to navigate, complex tool. Focus group participants also expressed frustration that TCAPP was not customizable and that the case studies were too lengthy to keep users' attention.

4. **Don't oversell TCAPP**. Practitioners strongly cautioned against overselling TCAPP as a comprehensive problem-solving tool or even a decision-support tool.

5. **The accelerated project delivery assessment could be valuable… if it was easier to find and more concise**. Users who tested this assessment said they found the output too lengthy (90+ pages) and found that it was difficult to sift through the results to find relevant information.

6. **Practitioners are worried about the lack of multi-modalism.** Participants were especially concerned about the lack of transit information. Perhaps TCAPP is multi-modal, but that wasn't their perception.

7. **Properly focused training and testimonials make a positive user experience more likely**. Practitioners reiterated the value of testimonials to attract new users to TCAPP. They also indicated that a focus on problem solving wasn't necessarily helpful platform from which to launch the user experience. For more discussion, see Section 8.

8. **Practitioners want to help**. Despite the difficulties practitioners experienced while trying to navigate the site, participants were highly engaged and demonstrated a real eagerness to help the team identify the positive aspects of TCAPP and how to "safely" market TCAPP (meaning not oversell).

9. **Practitioners triaged improvement recommendations** for the TCAPP site. See Section 9.

10. **There is convergence to build upon**. It would be unrealistic to expect unanimity, but there was remarkable similarity in the feedback between groups regarding a TCAPP definition, look and feel, name and tag line. There is also strong convergence around delivery mechanisms, target audiences, and the need to change the TCAPP name. That convergence is outlined in Section 6.

C-37 Focus Group Summary

## SECTION 4 –SETTING THE CONTEXT

To begin the day, the marketing team provided a short, introductory presentation about SHRP2 and the capacity area. TCAPP was introduced as a "website that integrates the resources developed through the SHRP2 capacity projects". The goal of the C-37 project and goals of the day were outlined.  Participants were encouraged to offer their honest opinions on using and marketing TCAPP.

## SECTION 5 – WORDS AND ATTRIBUTES THAT ARE MOST APPEALING

To gather and analyze feedback immediately, the marketing team asked participants to answer a series of questions related to the benefit, value, and appeal of a tool _like_ TCAPP via an on-line survey. These questions focused on the words and attributes that could be used to attract users to TCAPP, regardless of user experience. Appendix C shows survey responses for this activity.

*Practitioners' words about words that work:*

*"Use words like 'build support', 'smoother', 'faster', 'quicker', and 'efficient'."*

*"Wordy solutions to the primary value of TCAPP are not popular. Fewer words for marketing are better."*

*"TCAPP should help me deliver my project efficiently and provide consistent results."*

Participants discussed using the word "collaborate" to market TCAPP. Some expressed concern that the word is overused and has multiple meanings, rendering it "meaningless". Others indicated collaboration is a necessity and this word would speak to users who want to work with different groups (stakeholders, partners, agencies). Many indicated collaboration was a good goal to work toward in transportation planning. There was no consensus on whether this word should or should not be used.

Results to specific questions are presented on the following page.

Webinar feedback:

5 participants; 1 left the webinar after 16 minutes

- Participants find TCAPP to be a helpful resource

- One participant urged caution in trying to market TCAPP as a philosophy or way of doing business because DOTs already have their own processes; rather recommended it be used in "bits and pieces"

- One participant views TCAPP as a good learning tool for new staff coming on board

- The group recommended that TCAPP be marketed through face-to-face sessions at conferences

- There was some discussion about name and tag lines.  Unlike the face-to-face focus groups which had the opportunity to react to thought starter names and tags and then work in small groups to refine or develop new ideas, this group only had time to react to thought starters and the reaction was mixed.

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## WHAT TRAITS WOULD BE CONSIDERED THE GREATEST BENEFIT?

| Greatest benefits |
| --- |
| Collaborate with stakeholders more easily |
| Make more informed decisions |
| Integrate all the planning pieces/processes, avoid project delays |

## WHAT TRAITS APPEAL TO YOU AND MAKE YOU WANT TO USE TCAPP?

| Most appealing | Least appealing |
| --- | --- |
| It's simple and easy to use | It's detailed |
| It expedites your project delivery | It's more than a website – it's a process |
| It's a troubleshooting tool | |

## WHAT TRAITS MIGHT BE OF GREATEST VALUE TO DOTS AND MPOS?

| Most value |
| --- |
| It expedites project delivery |
| It increases collaboration |
| It helps public agencies avoid delays because it's a systematic and predictable way of planning projects |

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## SECTION 6 – HOW THE MOST APPEALING WORDS AND ATTRIBUTES COMPARED TO HANDS-ON EXPERIENCES

After participants identified what traits and benefits would be most desirable in a project like TCAPP, they participated in a hands-on session with TCAPP.  Prior to attending the focus group, participants had been asked to think about a long-range planning, programming, project development, or environmental permitting problem or challenge that their agency faces. On the second day, participants were asked to identify their problem so that marketing team members could highlight relevant sections of TCAPP for them.  Participants were instructed to use TCAPP to help them address their project concerns.

The first focus group was given minimal introduction to TCAPP focusing on the home page, while the second focus group was given a more guided overview that included the marketing team clicking on tabs and describing content within specific TCAPP sections.  The first focus group overview lasted 3-4 minutes whereas the second focus group introduction took approximately 10 minutes. Two participants in the second focus group were encouraged to focus on the expedited project delivery section.

After using TCAPP, the participants answered several questions about their experience. Both groups discussed how user expectations matched with user experience.  The marketing team asked the second focus group to also record their responses via the electronic survey form. Appendix D shows survey responses for the "hands-on with TCAPP" activity.

**What appeals to potential TCAPP users?**
- Collaborate with stakeholders
- Expedite project delivery
- Troubleshoot transportation problems
- Integrate planning processes

∧ *BEFORE* ∧
**HANDS-ON EXPERIENCE**
∨ *AFTER* ∨

**What are the benefits of TCAPP based on user experience?**
- Comprehensive reference guide
- Highlights real-world experiences
- Helps planners see overview of planning process

### HOW HELPFUL WAS TCAPP AT SOLVING THE PROBLEM YOU WERE FACING?

| Not at all helpful | Less helpful | Somewhat helpful | Very helpful |
|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 |

**After using TCAPP, participants rated TCAPP's ability to solve the problem as somewhat helpful (2.41/4.00, with 4.00 being very helpful). Most participants (88%) thought TCAPP could be helpful for other issues their agency faces.**

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## HOW LIKELY IS IT THAT YOUR COLLEAGUES WOULD USE TCAPP IF THEY WERE AWARE OF IT?

| Not likely | Less likely | Somewhat likely | Very likely |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**Participants rated the likelihood that their colleagues would use TCAPP if they were aware of it as somewhat likely (2.59/4.00, with 4.00 being very likely).**

A focus on problem solving didn't seem very helpful to participants, and some were even skeptical of TCAPP's ability to solve problems, suggesting that the marketing focus of TCAPP should be on the reference value and not as a site that provides tools to solve problems.

## BENEFITS AND BARRIERS TO USING TCAPP

| BENEFITS | BARRIERS |
|---|---|
| "Fantastic reference." | "TCAPP didn't seem customizable." |
| "Better to be a reference tool." | "Couldn't find tools." |
| "TCAPP guides the process – it's not going to problem solve." | "What do you do with all those questions?" |
| "TCAPP gives you the steps that if you follow, will enhance your chance of success." | "Fix the tool first... then market it." |
| "Position TCAPP as a guide and framework." | "There is too much going on." |
| "Would help early on in a corridor analysis." | "TCAPP didn't help me identify the key issues." |
| "People looking for the process will find TCAPP helpful." | "True assessment is missing for the project delivery piece." |
| "TCAPP is good for people looking to get started." | "TCAPP was dead on arrival for me; nothing worked for my problem." |
| "TCAPP could help educate external stakeholders." | "The questions were good, but if my answer was no – what then?" |
| | "I got kicked back to the same case study over and over and I couldn't find the piece that was relevant." |
| | "It took way too long to get where I needed to be." |
| | "I felt stranded." |
| | "Tool doesn't feel finished." |
| | "I'm concerned that the product isn't worth marketing." |
| | "There may be good information there, but it takes too long." |

These barriers impact the marketability of TCAPP. Many participants suggested that improvements be made to the navigation and site layout to make information easy to find and also go back and forth from one section to another without getting lost.

## SECTION 7 – BRANDING IDEAS

Each day, the focus group was divided into two breakout groups (four total groups) to discuss the look and feel, definition, name, and tagline of TCAPP.  All of the look and feel words suggested by the marketing team resonated with two or more of the breakout groups. The definitions had common themes, including "guide", "experiences", and "transportation planning". These words help define the who-what-when-where and why of TCAPP.

Two groups (from different days) converged on the name "Ike" and enjoyed brainstorming marketing materials ("I like Ike!" buttons/links on the web page, Ike on a bike).  While some additional acronyms were developed in the breakout groups, overall, personification and planning-themed names were the most popular. Taglines were varied, but many participants thought an action word (verb) would encourage people to visit (e.g. share, deliver, go). Appendix E shows an example of a breakout group board.

### LOOK AND FEEL

| WORDS THAT RESONATED | WORDS THAT DID NOT RESONATE |
|---|---|
| **Look** | **Look** |
| • clean<br>• sharp<br>• clear<br>• simple<br>• bright | • complex<br>• bold |
| **Feel** | **Feel** |
| • flexible<br>• real world (case studies)<br>• practical<br>• comprehensive (guide)<br>• efficient (navigation)<br>• traditional yet modern<br>• fresh (up-to-date) | • social<br>• problem-solver |

Participants chose several words to describe the look and feel of TCAPP. These words represent how the website should resonate with users when they're visiting TCAPP. The words that rose to the top with participants focus on the website as easy-to-use and practical – the website needs to give the user what they're looking for when they're looking for it.

C-37 Focus Group Summary

## DEFINITIONS

Participants identified TCAPP as a comprehensive resource guide most likely to help younger to mid-level transportation planning professionals. They cautioned against overselling TCAPP as a problem-solving tool and reiterated TCAPP's benefit as a reference. Participants were concerned with the credibility of any product that says it can deliver something, but does not actually deliver in the user experience. After using TCAPP, participants liked that they were able to view the overall planning process on one site and see how the various planning pieces and processes are integrated. Many concluded that the site provides a good outline for practitioners to follow for smoother project delivery.

*"TCAPP is not a solution path, it's a starting point."*

*"TCAPP is a high-level checklist."*

*"TCAPP is a fantastic reference."*

*"Position TCAPP as a guide and a framework."*

Participants were asked to brainstorm definitions for TCAPP. Many people emphasized shorter definitions, since lengthy responses don't keep people's interest (both verbally and in text). Several groups identified similar words while creating definitions:

- GUIDE (what the website is)
- EXPERIENCES (what the website contains)
- TRANSPORTATION PLANNERS (who the website is for)

Focus group members modified existing definitions provided by the project team. One of the definitions provided included the language "decision support tool" and many groups worked from this phrase. Following group discussion based on user experience, however, both focus groups converged on the idea that TCAPP was more of a reference and did not meet the expectation of some users that TCAPP could solve their problem. "Guide" and "reference" were words more commonly used to describe TCAPP.  Breakout groups developed the following draft definitions of TCAPP:

C-37 Focus Group Summary

- TCAPP is a comprehensive *GUIDE* that walks you through *EXPERIENCES* and decisions of *TRANSPORTATION PLANNERS* and stakeholders. Real world projects and challenges show the steps to make better, more informed decisions.

- TCAPP is a planning support tool built from the *EXPERIENCES* of transportation partners and stakeholders for collaboration, getting projects and plans done better, cheaper, and faster.

- TCAPP is your practical decision support tool built from *EXPERIENCES* of transportation professionals that provides the how-to for *TRANSPORTATION PLANNING* challenges through the use of checklists, adaptable documents, step-by-step strategies, and supportable results.

- TCAPP is a decision support tool, built from the *EXPERIENCES* of transportation partners and stakeholders, providing how-to information when it is most needed.

*Similar Definition Keywords:*

TCAPP is a...
*GUIDE*

TCAPP is based on...
*EXPERIENCES*

TCAPP is for...
*TRANSPORTATION PLANNERS*

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## NAMES AND TAGLINES

After identifying words and definitions that describe TCAPP, the focus group participants looked at the names and taglines that could replace and/or enhance the TCAPP brand. Similarly to the definitions, participants stressed that taglines need to be short and explanatory; both the name and tagline should give the user a clear sense of what the website does while enticing users to visit. Some groups encouraged the marketing team to not be afraid to "step outside our boring transportation names and go with something more attention grabbing".

| Names | Taglines |
|-------|----------|
| **Ike** | Transportation Planning @ Its Best |
| **Ike** | Integrating knowledge and experience |
| **PlanGuide** | Share ideas. Deliver projects. |
| **Planning Yard** | Faster projects. Better results. |
| **TranspoToolbox** | Go plan it! |

## SECTION 8 - TARGET AUDIENCES AND DELIVERY MECHANISMS

Focus group participants were also asked to identify the primary user market for TCAPP and how best to reach those potential users. Participants recommended focusing marketing efforts toward transportation planning professionals at DOTs and MPOs.

*"Get DOT and MPO endorsements."*

*"Add video testimonials from users (case studies)."*

*"Potential users should think, 'I face similar challenges. Maybe there's something here for me'."*

*"Incentivize people to use and share TCAPP."*

They agreed the best way to reach these users was through endorsements, both from professional organizations and peers. Top responses for each question are presented below with full electronic survey results presented in Appendix F.

| Institutions | Job Function | Communication | Conferences |
|--------------|--------------|---------------|-------------|
| AASHTO Standing Committee on Planning (SCOP) | Planners | Endorsements by organizations/groups | TRB Annual |
| TRB Committees | Project Managers | Peer to peer (share success stories) | AMPO |
| Association of Metropolitan Planning Organizations (AMPO) | MPO and local government staff | Webinar based TCAPP training courses | AASHTO Annual |

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In terms of user experience, marketing team members observed that experienced, positive voices in the crowd can make a difference. On the first day, two TCAPP pilot test members were present along with an ETG member and they helped explain how TCAPP is supposed to be used. This suggests training sessions will benefit from testimonials from actual users and/or a more sales-like approach to training. It's worth noting that while the intent of the C-37 team was to use neutral language and an objective facilitation approach to conduct the focus groups, on the second day the Principal Investigator and Lead Facilitator (Julie Lorenz) stepped out of that neutral role and asked leading questions to elicit positive responses that could be used to market TCAPP like, *"OK – we need to find something here that we can market. What did you find that you could say you liked or found helpful about the site?"*

Marketing team members concur with the recommendations of practitioners that TCAPP should not be promoted as a problem-solving tool. Participants were asked to think of a planning problem (long-range planning, programming, corridor or environmental) that they face at work. On the first day, participants were simply asked to recall that problem (they didn't share the problem with the group) and then explore how TCAPP could help address that problem. However, on the second day participants were asked to identify their problem to the group and a slightly longer introduction to TCAPP was provided so that participants could focus more on applying TCAPP to their problem. The second focus group expressed more much frustration with TCAPP than the first group suggesting that the marketing focus of TCAPP should be on the reference value of TCAPP and not as a site that provides tools to solve problems.

C-37 Focus Group Summary

## SECTION 9 – SITE IMPROVEMENTS

In both focus group sessions, participants had many recommendations that should be considered and prioritized if TCAPP is to become a relevant planning reference. Top concerns to be addressed include:

*NAVIGATION*

*"Where am I in the process?"*

*"There is good information there, but it takes too long - nobody has the time it would take."*

*"I've convinced myself that 30 minutes to find what you want is not that bad."*

*CUSTOMIZATION*

*"TCAPP doesn't query you for context."*

*"Add drop down list that filters results based on your problem. This allows the user to get what they need."*

*"Use TurboTax like feature that steps through a few questions to deliver more targeted results."*

*READABILITY*

*"A page of text is death on the web."*

*"Too much text upfront."*

*"If I wasn't part of the focus group, I wouldn't have had the patience to find what I needed."*

*"Nobody wants to read a long case study."*

## APPENDIX A

### PARTICIPANTS

| | Name | Organization | Location |
|---|---|---|---|
| **WEDNESDAY** | Tim Kassa | Georgia DOT | Georgia |
| | Brian Kennedy | AECOM | Colorado |
| | Anne Lenart-Redmond | HNTB | North Carolina |
| | Delwar Murshed | Washington State DOT | Washington |
| | Barry Seymour | Delaware Valley Regional Planning Commission | Delaware |
| | Matt Shands | Minnesota DOT | Minnesota |
| | Linda Wilson | Missouri DOT | Missouri |
| | | | |
| **THURSDAY** | Meredith Brady | Rhode Island DOT | Rhode Island |
| | Kelly Dunlap | AECOM | California |
| | Gordon Garry | Sacramento Area Council of Governments (SACOG) | California |
| | Mell Henderson | Mid-America Regional Council (MARC) | Missouri |
| | Judy Meyer | Public Information Associates | Texas |
| | Martin Palmer | Washington State DOT | Washington |
| | Alpesh Patel | North Carolina DOT | North Carolina |
| | Rick Record | RL Record LLC | Ohio |
| | Rob Rundle | San Diego Association of Governments (SANDAG) | California |
| | Shuming Yan | Washington State DOT | Washington |
| | Gary Jensen* | FHWA | D.C. |

*Observer only; attended both focus groups

As shown in the list above, the focus groups had a diverse representation of participants, geographically, organizationally, and functionally. Most participants had a planning background, but there were also several in the engineering and environmental fields, as well as some representation from professionals in public involvement. There was a good mixture of familiarity with TCAPP as well, with some participants having been involved in the initial planning and case study efforts and others experiencing the website for the first time as part of the focus group.

Throughout the day, participants were highly engaged and demonstrated an eagerness to help. Participants focused on their user experience, both positive and negative, to help build convergence on particular words, themes, and messages.

### APPENDIX B

## REPRESENTATIVE VERBATIM FEEDBACK

### HIGH LEVEL MESSAGING ACTIVITY

- "You don't know my problems."
- "TCAPP might help me educate stakeholders."
- "Use words like 'build support', 'smoother', 'faster', 'quicker', and 'efficient'."
- "TCAPP shouldn't imply it can do everything."
- "I want to know I'm doing the right thing. 'I went with TCAPP and it's endorsed by others.'"
- "Battle tested, DOT approved."
- "Don't oversell it."
- "Troubleshooting – quick, simple, and easy to glean problems in my backyard."
- "Help me deliver projects effectively and efficiently with good consistent results."
- "Collaborate is a necessity and it would speak to me."
- "Collaborate is a little over-used and has multiple meanings, making it a little meaningless."
- "Wordy solutions to the primary value of TCAPP are not popular. Fewer words for marketing are better."

### HANDS-ON TCAPP ACTIVITY

- "A bit overwhelming. There's a learning curve."
- "TCAPP didn't seem customizable."
- "I couldn't find the tools I needed."
- "I had context so I knew where to go, but if I was new to the industry, it could be extremely overwhelming."
- "TCAPP is a fantastic reference."
- "TCAPP isn't going to be a problem solver; it's going to guide the process."
- "It takes more than 30 minutes to find what it is you want. I've convinced myself that's not that bad."
- "If I wasn't part of the focus group, I wouldn't have had the patience to do it."
- "Suggestion – put in a drop down list of what kind of problem you have to allow users to get what they need."
- "A page of text is death on the web."
- "TCAPP is heavy ideologically heavy on the greenhouse gas side."
- "To me it wasn't clear what TCAPP could do."
- "The questions were clear to me. They were the questions you need to know was project manager."
- "TCAPP didn't help me identify the key issues."
- "In the project delivery piece, true assessment questions are missing."

- "It's supposed to enable people to have a problem, find the solution or think through the context."
- "Nothing in TCAPP worked for my project at the end of a project – it was dead on arrival for me."
- "At the corridor level I left very frustrated. I wouldn't recommend it to anyone. I wanted products, something practical. The questions were good but if my answer was no, what then? In the corridor one you get kicked back to the same case study over and over – it takes me to a super long document and I couldn't find the piece that was relevant."
- "For the project delivery piece, the assessment has assumed too much. I needed broader questions – are you in middle or early scoping, what is your timeline, what are the biggest risks, who are the key partners, etc. If you started at that level it could lead you down a path for options that are better associated with your answers. The user needs to be led somewhere – I felt stranded."
- "Tool doesn't feel finished."
- "If it's a highway-only tool, it's not going to play in our agency."
- "I'm concerned that the product isn't worth marketing."
- "This is a high-level checklist and can be useful on larger projects or on a scale that is new."
- "Your target is new young planning groups to help them get started."
- "TCAPP could help educate external stakeholders."
- "I'm shocked by how down the road and how tedious it is. There's no there there. I don't believe experience professionals will use it. Stakeholders would really get frustrated. There may be good information there, but it takes too long – nobody has the time it would take. It doesn't query you for context."

## FINAL THOUGHTS

- "Experiences are valuable – find people who've used it and let them talk about it."
- "Find some pilot projects, different types of projects, get some people to commit to use it."
- "Think about forums and LinkedIn social media – push the content out."
- "Get DOT endorsements and get consultants to use it."
- "Fix the tool first, and then market it."
- "When you try to sell this, there is too much going on and it's human nature that we already know what we're doing. That means that there is natural resistance. Having a human being saying here's what I did and how TCAPP helped will work. Just telling people go to this site and to use it won't work."
- "The marketing needs to be realistic – if you start marketing and it doesn't work you'll lose credibility so quickly."
- "Get people who are well respected within the groups who have been involved and can explain the use of the tool."
- "Add multi-modal designation."
- "Incentivizing use of the tool might help usage."

## APPENDIX C

### SURVEY RESULTS – WORDS AND ATTRIBUTES THAT ARE MOST APPEALING

| The following traits could be used to describe TCAPP's benefits. Please indicate how much benefit you think each trait provides. | Greatest benefit | | Some benefit | | Little or no benefit | | Rating Average | Response Count |
|---|---|---|---|---|---|---|---|---|
| | Percentage | Count | Percentage | Count | Percentage | Count | | |
| See the overall planning process | 0.60 | 10 | 0.40 | 7 | 0.00 | 0 | 2.59 | 17 |
| Outline the steps for smoother project delivery | 0.80 | 13 | 0.20 | 3 | 0.00 | 0 | 2.81 | 16 |
| Collaborate with stakeholders more easily | 0.70 | 12 | 0.30 | 5 | 0.00 | 0 | 2.71 | 17 |
| Easily identify all stakeholders | 0.40 | 7 | 0.60 | 10 | 0.00 | 0 | 2.41 | 17 |
| Troubleshoot planning problems | 0.50 | 9 | 0.50 | 8 | 0.00 | 0 | 2.53 | 17 |
| Make more informed decisions | 0.80 | 14 | 0.20 | 3 | 0.00 | 0 | 2.82 | 17 |
| Get broad acceptance at each step of the process | 0.60 | 10 | 0.40 | 6 | 0.00 | 0 | 2.63 | 16 |
| Integrate all the planning pieces/processes | 0.70 | 12 | 0.30 | 5 | 0.00 | 0 | 2.71 | 17 |
| Improve compliance with regulations | 0.50 | 8 | 0.50 | 8 | 0.00 | 0 | 2.50 | 16 |
| Easily educate stakeholders | 0.50 | 9 | 0.50 | 8 | 0.00 | 0 | 2.53 | 17 |
| Avoid project delays/deliver project faster | 0.80 | 13 | 0.20 | 4 | 0.00 | 0 | 2.76 | 17 |
| Expedite project/planning process | 0.60 | 10 | 0.40 | 6 | 0.00 | 0 | 2.63 | 16 |
| Educate new employees on planning process | 0.60 | 9 | 0.40 | 7 | 0.00 | 0 | 2.56 | 16 |

| Please indicate which traits would appeal to people to use TCAPP. | Most appealing | | Somewhat appealing | | Least appealing | | Rating Average | Response Count |
|---|---|---|---|---|---|---|---|---|
| | Percentage | Count | Percentage | Count | Percentage | Count | | |
| It's simple and easy to use. | 0.80 | 14 | 0.20 | 3 | 0.00 | 0 | 2.82 | 17 |
| It's comprehensive. | 0.70 | 12 | 0.20 | 4 | 0.10 | 1 | 2.65 | 17 |
| It helps you see the big picture. | 0.70 | 12 | 0.20 | 3 | 0.10 | 2 | 2.59 | 17 |
| It's detailed. | 0.30 | 5 | 0.20 | 4 | 0.50 | 8 | 1.82 | 17 |
| It has case studies from other states/MPOs. | 0.40 | 7 | 0.20 | 4 | 0.40 | 6 | 2.06 | 17 |
| It will make your job easier. | 0.60 | 11 | 0.20 | 4 | 0.10 | 2 | 2.53 | 17 |
| It's more than a website - it's a process. | 0.20 | 4 | 0.20 | 4 | 0.50 | 9 | 1.71 | 17 |
| It helps you get projects unstuck - or helps you avoid getting stuck in the first place. | 0.60 | 10 | 0.20 | 4 | 0.20 | 3 | 2.41 | 17 |
| If expedites your project's delivery. | 0.80 | 13 | 0.20 | 3 | 0.10 | 1 | 2.71 | 17 |
| It's a trouble shooting tool. | 0.90 | 15 | 0.10 | 1 | 0.10 | 1 | 2.82 | 17 |
| It's free. | 0.60 | 10 | 0.20 | 4 | 0.20 | 3 | 2.41 | 17 |

| Please identify what the primary value of TCAPP could be for DOTs and MPOs. Please select all that apply. | Percentage | Count |
|---|---|---|
| It's a great in-depth reference guide. | 0.13 | 6 |
| It helps public agencies avoid delays because it's a systematic and predictable way of planning projects. | 0.17 | 8 |
| It increases collaboration. | 0.20 | 9 |
| It makes problem solving easier. | 0.13 | 6 |
| It lays out a system to follow to so that your project won't get stuck. | 0.11 | 5 |
| It expedites project delivery. | 0.26 | 12 |
| Other (please specify) | It provides an approved and compliant strategy Provides consistency to planning process. | |

## APPENDIX D

### SURVEY RESULTS – HANDS-ON WITH TCAPP

| How would you rate TCAPP's ability to solve the problem you were facing? | Very helpful | | Somewhat helpful | | Less helpful | | Not at all helpful | |
|---|---|---|---|---|---|---|---|---|
| | Percentage | Count | Percentage | Count | Percentage | Count | Percentage | Count |
| | 0.00 | 0 | 0.65 | 11 | 0.12 | 2 | 0.24 | 4 |

| Do you think TCAPP could be helpful for other issues your agency may face? | Yes | | No | |
|---|---|---|---|---|
| | Percentage | Count | Percentage | Count |
| | 0.88 | 15 | 0.12 | 2 |

| How could TCAPP be more effective at helping solve your agency's problems and challenges? |
|---|
| By providing context sensitive (by project type) planning processes. |
| Need to be able to customize  More case studies, but with a way to find relevant examples  Lots of decision-making questions,but no guidance on what to do with answers |
| TCAPP is a good tool to show overall planning process and linkages between long term planning and NEPA--but is not detailed enough to solve all planning showstoppers or get a project unstuck.  Perhaps, my problem was too specific? |
| Some sort of effective "support" option that might allow me to understand how others with similar challenges have used TCAPP to address similar challenges, or even to talk to an actual person to get guidance, ask questions, etc... |
| I don't think TCAPP could solve the problem, but could provide latitude for local customization. |
| It needs to be able to be more specific and/or more customizable. |
| Not sure at this point due to my unfamiliarity with the tool. |
| More targetend information for each key decision with examples. |
| needs to be re-designed to lead the user from the context they are in down a path to particular solutions that fit their local problem |
| Be more specific as to outlining (and prompting for) the broad array of issues and better outline steps to get stakeholder "consent" |
| Provide more broad questions to help navigate toward documents and additional information that could clarify processes and recommend steps, rather than providing a narrow focus from the start of the assessment. |
| Be easier to use and comprehend.  Have applicability beyond roadway planning. |
| be much less presumptive about how things actually are |
| I think TCAPP can help identify issues, but I do not see it solving agency problems that are usually more policy related. |
| Could be useful in setting up new project or planning processes. |
| Needs to provide more substantive information and resources that are linked to the questions.  I wanted it to help me by providing me with more examples and "hows" |

| How likely do you think your colleagues would be to utilize TCAPP if they were made aware of it? | Very helpful | | Somewhat helpful | | Less helpful | | Not at all helpful | |
|---|---|---|---|---|---|---|---|---|
| | Percentage | Count | Percentage | Count | Percentage | Count | Percentage | Count |
| | 0.06 | 1 | 0.59 | 10 | 0.24 | 4 | 0.12 | 2 |

| What is the biggest barrier to you or your colleagues using TCAPP? (choose all that apply) | Percentage | Count |
|---|---|---|
| It's not that helpful. | 0.11 | 5 |
| It's not user-friendly and is difficult to navigate | 0.14 | 6 |
| It's a bit overwhelming to understand the complexity of it. | 0.23 | 10 |
| We already have proven methods that work well for us. | 0.09 | 4 |
| It doesn't tell me how to fix my problem, it just provides questions. | 0.23 | 10 |
| I don't have enough time or staff to learn how to use a new tool/approach/process. | 0.07 | 3 |
| Our agency is more focused on operational issues than planning issues. | 0.05 | 2 |
| There's nothing that proves or demonstrates TCAPP's effectiveness. | 0.09 | 4 |
| Nothing. It's a great tool. | 0.00 | 0 |

Other (please specify)    There is not much information on how to work with stakeholders
Some of us think the methods we're using work better than they actually do

| Did you use the expedited project delivery assessment tools? | Yes | | No | |
|---|---|---|---|---|
| | Percentage | Count | Percentage | Count |
| | 0.24 | 4 | 0.76 | 13 |

| After using TCAPP, what traits best describe the benefits of using TCAPP to help solve your problem or address your challenge? Please select your TOP 3 choices. | Percentage | Count |
|---|---|---|
| See the overall planning process | 0.15 | 5 |
| Outline the steps for smoother project delivery | 0.12 | 4 |
| Collaborate with stakeholders more easily | 0.09 | 3 |
| Easily identify all stakeholders | 0.06 | 2 |
| Troubleshoot planning problems | 0.12 | 4 |
| Make more informed decisions | 0.06 | 2 |
| Get broad acceptance at each step of the process | 0.06 | 2 |
| Integrate all the planning pieces/processes | 0.15 | 5 |
| Improve compliance with regulations | 0.06 | 2 |
| Easily educate stakeholders | 0.00 | 0 |
| Avoid project delays/deliver project faster | 0.00 | 0 |
| Expedite project/planning process | 0.06 | 2 |
| Educate new employees on planning process | 0.06 | 2 |

Other (please specify)          I was frustrated to be honest and didn't find it helpful

APPENDIX E

## EXAMPLE BREAKOUT GROUP BOARD
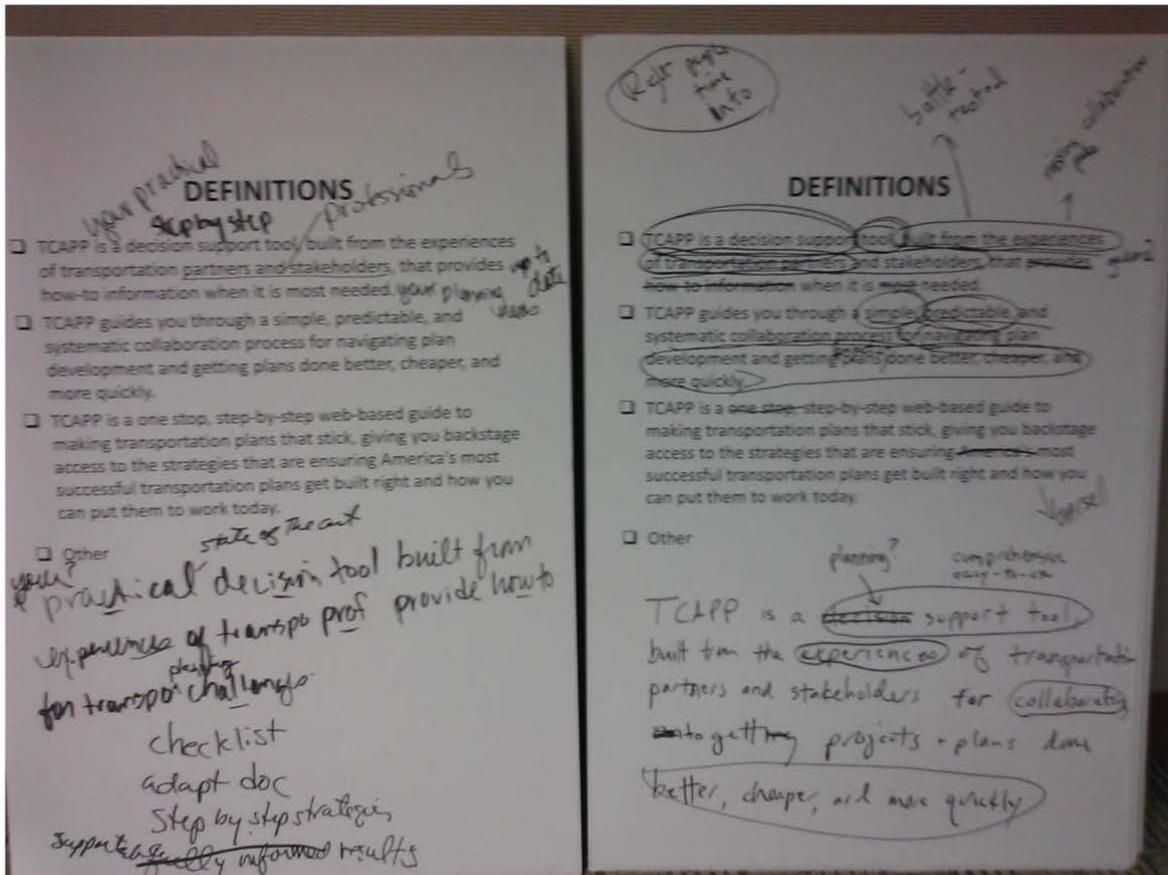
### APPENDIX F

## SURVEY RESULTS – HOW TO COMMUNICATE WITH TCAPP USERS

| What groups could best assist in institutionalizing TCAPP? Please select your TOP 3 choices. | Percentage | Count |
|---|---|---|
| AASHTO Standing Committee on Planning (SCOP) | 0.29 | 14 |
| AASHTO Standing Committee on Highways (SCOH) | 0.04 | 2 |
| TRB Committees | 0.22 | 11 |
| AASHTO Executive Staff | 0.02 | 1 |
| AASHTO Regional Associations | 0.00 | 0 |
| Association of Metropolitan Planning Organizations (AMPO) | 0.20 | 10 |
| National Association of Regional Councils (NARC) | 0.06 | 3 |
| Young Professionals in Transportation (YPT | 0.00 | 0 |
| National Association of Counties (NACO) | 0.00 | 0 |
| National League of Cities | 0.00 | 0 |
| National Association of Development Organizations (NADO) | 0.00 | 0 |
| Institute of Transportation Engineers (ITE) | 0.06 | 3 |
| American Planning Association (APA | 0.10 | 5 |

Other (please specify)        FHWA
                                       AASHTO

| What level should be the first target to promote TCAPP? | Percentage | Count |
|---|---|---|
| Executive | 0.12 | 2 |
| Senior staff | 0.41 | 7 |
| Middle management | 0.35 | 6 |
| Entry level | 0.12 | 2 |

| What group will most likely jump on board first? Please select your TOP THREE choices. | Percentage | Count |
|---|---|---|
| Planners | 0.31 | 16 |
| Engineers | 0.00 | 0 |
| Project managers | 0.15 | 8 |
| Program managers | 0.04 | 2 |
| Consultants | 0.04 | 2 |
| Executives and policy makers | 0.02 | 1 |
| Practitioners with moderate planning knowledge | 0.12 | 6 |
| States with expansion projects | 0.04 | 2 |
| Public affairs professionals | 0.04 | 2 |
| Environmental professionals | 0.08 | 4 |
| External stakeholders | 0.02 | 1 |
| MPOs and local government | 0.15 | 8 |

| What is the most effective way to get the word out and build the TCAPP user base? Please select your TOP THREE choices. | Percentage | Count |
|---|---|---|

| | | |
|---|---|---|
| Endorsements of organizations or groups (AASHTO, SCOP, AMPO, etc.) | 0.15 | 10 |
| Handout/manual/booklet describing the function and benefits | 0.00 | 0 |
| Endorsements of high profile people (LaHood, Mendez, Horsley, etc.) | 0.00 | 0 |
| General sessions presentations at conferences | 0.09 | 6 |
| Peer to peer - show success stories from the original research | 0.12 | 8 |
| Create a user's group to share lessons learned and helpful hints | 0.03 | 2 |
| Presentations at meetings (TRB committees, SCOP, SCOH, etc.) | 0.09 | 6 |
| Articles in periodicals like "Urban Transportation Monitor" | 0.08 | 5 |
| Social media | 0.05 | 3 |
| Hands-on, in-person TCAPP training courses | 0.06 | 4 |
| Webinar based TCAPP training courses | 0.11 | 7 |
| Web based TCAPP training courses | 0.03 | 2 |
| Testimonials from users | 0.03 | 2 |
| Case study results | 0.00 | 0 |
| Colleague recommendation | 0.02 | 1 |
| Supervisor recommendation | 0.00 | 0 |
| Agency endorsement | 0.03 | 2 |
| Email blasts | 0.03 | 2 |
| Incorporate into graduate school curricula as a teaching tool | 0.05 | 3 |
| Create a TCAPP game and allow people to develop avatars | 0.02 | 1 |
| Offer incentives for people to use TCAPP - like free coaching or consulting | 0.03 | 2 |

Other (please specify)
Piggyback on existing planning courses offered by FHWA, FTA, NIT, etc. etc
word of mouth based on REAL BENEFIT AND RESULTS

| What conferences are likely to be the most influential in promoting TCAPP? Please select your TOP 3 choices. | Percentage | Count |
|---|---|---|
| AASHTO annual | 0.16 | 8 |
| AASHTO spring | 0.02 | 1 |
| AASHTO regional conferences | 0.14 | 7 |
| TRB annual | 0.3 | 15 |
| TRB summer | 0.04 | 2 |
| Topic-specific conferences | 0.1 | 5 |
| AMPO | 0.2 | 10 |
| NARC | 0.04 | 2 |

Other (please specify)
Regional and National APA conferences

# APPENDIX C:

# ELECTRONIC SURVEY

## Rebranding TCAPP

We are undergoing an effort to rebrand TCAPP - including potentially a new name, tag line, logo, and color palette. The first set of questions asks you to rate four names and logos with five taglines. The second set of questions asks you to rate those same names and logos with color palettes applied. Please respond to the survey below to offer your feedback.

### 1. Self identify (please check all that apply)

☞ I participated in an AASHTO TCAPP Assessment Workshop this spring.

☞ I am a member of the TETG (Technical Expert Task Group) for C37.

☞ I am involved in the Technical Coordinating Committee for SHRP2 Capacity.

☞ I participated in an AASHTO Standing Committee on Planning SHRP2 Capacity Projects Strategic Planning Workshop.

☞ Other (please specify)

### 2. My primary job function is (check all that apply):

☞ Planning

☞ Engineering

☞ Project Management/Project Development

☞ Senior Leadership

Other (please specify)

Page 1

## Rebranding TCAPP

### Concept #1



The dots and arrow design are meant to visually represent a dynamic flow-chart and how TCAPP provides direction and momentum to a project.

### 3. What is your reaction to Concept #1?

| 1 -<br>Negative<br>Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 -<br>Positive<br>Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ |

# Rebranding TCAPP

## Concept #2

### Navigator
#### Planning better projects.

The name speaks to a tool or approach to move projects or programs forward, though not always in a straight line. The design is stylized and abstractly represents a compass dial. The circular elements represent speed and ease of movement.

## 4. What is your reaction to Concept #2?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ◻ | ◻ | ◻ | ◻ | ◻ | ◻ | ◻ | ◻ | ◻ | ◻ |

## Rebranding TCAPP

### Concept #3



'Works' in this design can be viewed from several perspectives. Some think of it as 'planning (itself) works', others think of "works' as in a workshop or a place to work on your planning. The graphic is perceived differently by different audiences. Several perspectives include: 1) a flower blooming as a visual idea of a project coming to life (2) the abstract and geometric design takes on the characteristics of a compass dial (3) the opacity and overlapping in the design represents the different entities working together or the "pages" of a project plan.

### 5. What is your reaction to Concept #3?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊡ | ⊡ | ⊡ | ⊡ | ⊡ | ⊡ | ⊡ | ⊡ | ⊡ | ⊡ |

## Rebranding TCAPP

### Concept #4



This is the same look as the previous concept, but with a different tag line.

### 6. What is your reaction to Concept #4?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |  |  |

## Rebranding TCAPP

### Concept #5



The name reflects the function of the tool. The design and tag line were previously described.

### 7. What is your reaction to Concept #5?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ |

The following questions present three color palettes applied to each name, logo and tag.

### PALETTE 1

### THEME: **ENERGY & EFFICIENCY**



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## Rebranding TCAPP

### Concept #6



**8. What is your reaction to Concept #6?**

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

### Concept #7



**9. What is your reaction to Concept #7?**

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

### Concept #8

## Rebranding TCAPP

### 10. What is your reaction to Concept #8?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

### Concept #9



### 11. What is your reaction to Concept #9?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

### Concept #10



### 12. What is your reaction to Concept #10?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

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## Rebranding TCAPP

### PALETTE 2

#### THEME: **SIMPLICITY & SOPHISTICATION**

#### Concept #11



#### 13. What is your reaction to Concept #11?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ |

#### Concept #12

## Rebranding TCAPP

### 14. What is your reaction to Concept #12?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

## Concept #13


PlanWorks — Better planning. Better projects.

### 15. What is your reaction to Concept #13?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

## Concept #14


PlanWorks — Partnership for better projects.

### 16. What is your reaction to Concept #14?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|

## Rebranding TCAPP

### Concept #15

**Project Planning Advisor**
*Better decisions. Better delivery.*

### 17. What is your reaction to Concept #15?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ |

### PALETTE 3

#### THEME: **BOLD ACTION**

## Rebranding TCAPP

### Concept #16



### 18. What is your reaction to Concept #16?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ |

### Concept #17



### 19. What is your reaction to Concept #17?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ | ⊣ |

## Rebranding TCAPP

### Concept #18



### 20. What is your reaction to Concept #18?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ |

### Concept #19



### 21. What is your reaction to Concept #19?

| 1- Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ | ⌐ |

## Rebranding TCAPP

### Concept #20

**Project Planning**
**Advisor**
*Better decisions. Better delivery.*

### 22. What is your reaction to Concept #20?

| 1 - Negative Impression | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - Positive Impression |
|---|---|---|---|---|---|---|---|---|---|
| ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ | ⊥ |

### 23. Do you have any additional comments or thoughts you would like to share with us?

# APPENDIX D:

# ELECTRONIC SURVEY ANALYSIS

| I participated in an AASHTO TCAPP Assessment Workshop this spring. (67 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| TCAPP Planning better projects | 4.51 | **46.27%** | 25.37% | 28.36% |
| Navigator Planning better projects. | 5.44 | 31.82% | 15.15% | 53.05% |
| PlanWorks Better planning. Better projects. | 5.92 | 21.22% | 21.21% | 57.58% |
| PlanWorks Partnership for better projects. | 5.8 | 22.73% | 25.76% | 51.52% |
| Project Planning Advisor Better decisions. Better delivery. | **6.14** | 21.22% | 12.12% | **66.66%** |

| I participated in an AASHTO TCAPP Assessment Workshop this spring. (67 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| Energy & Efficiency | **5.45** | 32.02% | 18.12% | **49.85%** |
| Simplicity & Sophistication | 4.3 | **53.17%** | 18.54% | 28.29% |
| Bold Action | 4.89 | 41.74% | **19.41%** | 38.85% |
| | | | | |
| | | | | |

| I am a member of the TETG (Technical Expert Task Group) for C37.  (6 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| TCAPP Planning better projects | 4.17% | **50.01%** | 33.33% | 16.67% |
| Navigator Planning better projects. | 6.17% | 16.67% | 16.67% | **66.67%** |
| PlanWorks Better planning. Better projects. | **6.67%** | 33.33% | 0 | **66.67%** |
| PlanWorks Partnership for better projects. | 6.00% | 33.34% | 0 | **66.67%** |
| Project Planning Advisor Better decisions. Better delivery. | 5.33% | 33.34% | 33.33% | 33.34% |

| I am a member of the TETG (Technical Expert Task Group) for C37. (6 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| Energy & Efficiency | 5.09 | 37% | 21% | 42% |
| Simplicity & Sophistication | 3.28 | 64% | 20% | 16% |
| Bold Action | 4.92 | 44% | 12% | 44% |
| | | | | |
| | | | | |

| I am involved in the Technical Coordinating Committee for SHRP2 Capacity. (11 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| TCAPP — Planning better projects | 4.9 | 30% | 20% | 50% |
| Navigator — Planning better projects. | 5.8 | 30% | 10% | 60% |
| PlanWorks — Better planning. Better projects. | 6.5 | 20% | 20% | 60% |
| PlanWorks — Partnership for better projects. | 6.9 | 20% | 10% | **70%** |
| Project Planning Advisor — Better decisions. Better delivery. | 4.9 | 30% | 30% | 40% |

| I am involved in the Technical Coordinating Committee for SHRP2 Capacity. (11 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| Energy & Efficiency | 5.84 | 24.67% | 16.22% | 59.11% |
| Simplicity & Sophistication | 5.06 | 30% | 26% | 44% |
| Bold Action | 5.81 | 22.44% | 10% | 67.55% |
| | | | | |
| | | | | |

| I participated in an AASHTO Standing Committee on Planning SHRP2 Capacity Projects Strategic Planning Workshop. (27 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| TCAPP Planning better projects | 3.63 | **70.37%** | 11.11% | 18.51% |
| Navigator Planning better projects. | 4.5 | 50% | 15.38% | 34.62% |
| PlanWorks Better planning. Better projects. | **5.96** | 19.24% | 23.08% | **57.7%** |
| PlanWorks Partnership for better projects. | 5.65 | 26.93% | **26.92%** | 46.15% |
| Project Planning Advisor Better decisions. Better delivery. | 5 | 34.61% | 19.23% | 46.15% |

| I participated in an AASHTO Standing Committee on Planning SHRP2 Capacity Projects Strategic Planning Workshop. (27 respondents) | MEAN | NEGATIVE | NEUTRAL | POSITIVE |
|---|---|---|---|---|
| Energy & Efficiency | 4.7 | 47.41% | **22.22%** | 30.37% |
| Simplicity & Sophistication | 3.76 | **66.07%** | 15.85% | 18.07% |
| Bold Action | **4.87** | 44.44% | 16.29% | **39.25%** |
| | | | | |
| | | | | |

# APPENDIX E:

# ELECTRONIC SURVEY: OTHER SUGGESTIONS/COMMENTS

## Other Logo/Tag line Suggestions

- I like to Project Planning Advisor (P2A?) branding. But I also like the "Partnering" theme in the tag line to reflect the collaboration elements of the tool. Any chance of merging?

- I respect that finding a better name than "TCAPP" is quite, quite challenging! Perhaps a solution is simply to call this "The Transportation Planner" or the "Transportation Navigator" with no slogan. Granted, the software can help one do a lot (prioritize, form partnerships, make investment decisions, work through environmental regulations)—but sometimes it might be better just to say what this does even if it does not sound exciting. (We all know what the Highway Capacity Manual or the Consumer Price Index mean, even though they don't have a slogan.) I admit I am not a marketing expert, though, so take my opinion with a grain of salt.

- None of these include the word "transportation." We are muddying the waters for users who don't know what the tool is.

- Project Advisor Better Planning. Better Decisions.

- "Partnerships for better projects" goes better with TCAPP.

- TRANSPORTATION NAVIGATOR Partnerships for Better Decisions

- Collaboration for Improved Mobility. Better Transportation.

- Project Planning or Transportation Planning.

- I like the "Project Planning Advisor" logo the best BUT would change to "Plan and Project Advisor." Long Range Planning is not the same as Project Planning and it may mislead people to think that the tool is ONLY for use with project plans.

- What about using the logo for Item 1 (the 3 dots and arrows) and a name from the last? I like the dots and arrows logo, but there is no reason to keep the TCAPP name

- Try combining PlanWorks with Better Decisions. Better Delivery.

- Maybe it's too late in the process, but have you thought about coming up with an entirely new acronym? None of the options presented do much for me.

- PlanWorks sounds and looks like a consulting firm. Navigator logo looks like a throwing star (weapon). Concentrate on the user interface. Make it great. Drop the tag line from all. It will be extraneous once the user interface is intuitive. Please put most of your efforts toward that.

- PlanWorks makes it sound like Long Range Plan development so steers folks in the wrong direction. Navigator is just OK but better than others. What about Plan2Project or something that better illustrates the movement through the stages—also need the collaboration aspect so I like the word partnership showing up in the brand. My try: Plan2Project: Partnerships for success (??????)

## Positive Comment on Specific Logo/Tag line

- PlanWorks with bold colors is the best brand for me. Thanks for the opportunity.

- Most of these are much too complicated still. Navigator is the best—the simplest, easiest to remember.

- I like PlanWorks with either tag line. I like both color palettes that include the green/yellow and blue/orange. The "shades of blue" is too boring.

- I like the logo from the first one, but really dislike the term TCAPP. Would have been nice to see that logo with one of the other terms.

## Negative Comment on Specific Logo/Tag line

- "Better planning—better projects" to me implies that agencies are not doing planning well at this time. Just a first impression. . .

- Navigator looks too corporate Advisor; suggests there will be AN answer/solution at the end. . . .

- Please do not pick the first one.

- I think the words "partnership" and "advisor" are misleading. When I was at the workshop, the tool is static, and serves more as a resource than a guide or active tool. Thanks!

- Don't use TCAPP; don't use too many words. This doesn't matter that much; shouldn't be a high priority in improving TCAPP compared to content and navigation and user interface of the site.

## Positive Comment on Specific Color Palette

- PlanWorks with bold colors is the best brand for me. Thanks for the opportunity.

- I like the fact that we were heard and progress is being made. I really like the bold colors the best.

- I like PlanWorks with either tag line. I like both color palettes that include the green/yellow and blue/orange. The "shades of blue" is too boring.

## Negative Comment on Specific Color Palette

**None.**

## General Comment on Logos

- I don't really care for any of the logos with the flowers or other symbols at the beginning.

- I would have loved to have seen the designs next to each other. I think I may have made different choices.

- Don't feel that any of these logos/wordmarks are very strong; they all feel fairly generic. I would strongly de-emphasize the word 'plan' or 'planning'—it doesn't have much resonance to elected or the public, and in our area has negative connotation. Our audience is much more interested in words that suggest construction and on-the-ground built projects. The word "planning" can be understood as mere process and/or government inefficiency when disconnected from actual construction. But I don't have a strong impression on what the logo is, I'm more interested in the web site, its user interface and content organization.

- No acronyms

## General Comment on Color Palettes

- I just don't like any of the color palettes.

## General Comment

- Thanks for the opportunity to comment. Greatly appreciated.

- Good Job!

- Content first!

# APPENDIX F:

# SUGGESTED STYLE GUIDANCE

# Logo Usage & Brand Guidelines

The selected logo will be the most visible aspect of the new brand. Proper usage of the logo will be needed to consistently communicate a high degree of professionalism in all communications materials. In order to fully communicate the brand, the selected logo should always be used in conjunction with its tagline. The logo and tagline lock-up should only be used in the manners outlined below.

At the time of this writing there are 15 logo, name, tagline and color options under consideration.

Samples are included here.

# Logo Usage & Brand Guidelines

## Logo Usage

When a final logo has been selected, it will be important to define its proper usage in all communications materials. The items below illustrate suggested usage instances that should be included in a comprehensive style guide.

### Primary Usage
Whenever possible, the logo should be used in full color and at a size large enough to be easily read.



### 1-Color Usage
Under certain circumstances full color usage will not be possible. It is important to define the acceptable 1-color versions of the logo. Typically 1-color versions include black and selected primary colors from the approved color logo.



### Reversed-Out Usage
From time to time, it may be necessary to reverse the logo out of a block of color. These instances typically call for the logo to be used in all white on a solid block of black or one of the primary colors from the approved logo.

## Logo Usage & Brand Guidelines

### Clear Space

In order to standardize the use of the logo as much as possible, it is important to define the desired amount clear space around the logo when it appears in a layout with additional visual elements.

Typically, an element from the logo itself is used to define the proper clear space. In the example below, the height of the "B" in "Better" has been used as a guide.



### Minimum Size

To ensure proper legibility, it is important to define the minimum size at which the logo should be used. This example illustrates that the logo should not be used at a size smaller than 0.5 inches.



0.5 inches

# Logo Usage & Brand Guidelines

## Color

When a logo and color palette have been selected, it will be important for all of the colors in the palette to be defined for use across a variety of media. The example outlined below includes primary, secondary and additional colors that could be used in conjunction with the approved logo. The information below each color swatch shows the numeric value for the color in the Pantone Matching System, CMYK Process color, RGB Screen color and HTML Hexidecimal color.

### Primary Colors

**Process Black**
c0 m0 y0 k0
r0 g0 b0
#000000

**Primary Orange**
PMS #158
c4 m68 y99 k0
r234 g113 b37
#ea7125

**Primary Blue**
PMS#7468
c97 m44 y26 k3
r0 g117 b115
#00759b

### Secondary Colors

**Secondary Orange**
PMS #150
c0 m40 y75 k0
r255 g170 b82
#ffaa52

**Secondary Blue**
PMS #7458
c55 m13 y13 k0
r110 g180 b205
#6eb4cd

**Secondary Yellow**
PMS#7468
c97 m44 y26 k3
r0 g117 b11
#00759b

**Medium Gray**
c0 m0 y0 k60
r128 g130 b133
#808285

**Light Gray**
c0 m0 y0 k20
r209 g211 b212
#d1d3d4

### Additional Colors

**Accent Green**
PMS #363
c79 m23 y100 k9

**Secondary Green**
PMS #359
c39 m0 y60 k0

**Accent Violet**
PMS#2622
c68 m93 y32 k20

**Light Violet**
PMS #257
c17 m37 y0 k0

# Logo Usage & Brand Guidelines

## Do Nots

It is customary to include examples of improper usage of a logo within a style guide. The following examples represent common mistakes that can occur with logo usage. It is important to emphasize that care should be taken to avoid these errors.



Do not place the logo in a box or any other shape.



Do not change the relationship of the logo and tagline lock-up.



Do not distort the logo by skewing or stretching.



Do not use the logo in an unapproved color.



Do not add a suffix to the logo or tagline lock-up.



Do not attempt to recreate the logo from common fonts.



Do not squish the logo or change the height to width aspect ratio.



Do not reverse the logo out of a complicated background that makes it hard to read.

# Logo Usage & Brand Guidelines

## Typography

It is typical to include the approved typefaces to be used as part of the brand and logo usage guidelines. In the example below, Myriad Pro from Adobe has been selected as the primary brand typeface and samples of it are shown. On some occasions it is important to include both a serif and sans serif typeface. Additionally, it may be necessary to include alternate typefaces for use in everyday communications materials when the approved typeface is not available.

**Myriad Pro Light**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Light Italic**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Regular**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Italic**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Semibold**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Semibold Italic**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Bold**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Bold Italic**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Black**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

**Myriad Pro Black Italic**
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
0123456789

# APPENDIX G:

# List of Abbreviations

## 1.0    LIST OF ABBREVIATIONS

### ABBREVIATIONS

| ACRONYM | WHAT IT STANDS FOR |
| --- | --- |
| TCAPP | Transportation for Communities—Advancing Projects through Partnerships |
| TRB | Transportation Research Board |
| AASHTO | American Association of State Highway and Transportation Officials |
| SHRP 2 | Strategic Highway Research Program |
| FHWA | Federal Highway Administration |
| DOT | Department of Transportation |
| LTAP | Local Technical Assistance Program |