Pilot Evaluation Scorecard: Project Description

Version 4 (Nov. 2018)

Instructions: Please fill out this project description before filling out the attached scorecard. Feel free to copy from and/or attach a project charter for reference.

Date of evaluation: _____ Name of reviewer: _____

Pilot name	
Lead agency	
Partners	
Pilot description	
Pilot objectives State the top 1-3 objectives of the pilot	
Which of the following goals does the pilot specifically seek to advance? The goals selected will be prioritized in the scorecard. Feel free to rank or check boxes.	☐ Safety ☐ Mobility ☐ Customer Experience ☐ Accessibility (physical, digital, financial, and/or language) ☐ Affordability ☐ Sustainability ☐ Collaboration/Partnerships ☐ Accountability ☐ Equity
Pilot focus area Note geographic bounds, specify census block tracts impacted if possible	
Pilot timeline E.g., 2017-2020	
Evaluation period E.g., Mar. 2018 – Sept. 2018	

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Pilot Evaluation Scorecard: Instructions

When to use this scorecard:
1. To evaluate a completed pilot or a pilot that is currently underway
2. To design a new pilot

Instructions for using this scorecard:
1. Review performance metrics in each goal area and add/edit metrics as appropriate. (This step can be performed throughout the evaluation.)
2. Fill in the "Target for this pilot" column to the extent possible. What if any specific objectives did you set at the beginning of the pilot?
3. Fill in the "Baseline" column with the performance of the transportation system in your jurisdiction on a given metric to the extent possible.
4. Fill in the "All users served by the pilot" column with the performance of the pilot for the total population of individuals served by the pilot.
5. Fill in the other user columns (e.g., "Users of color" and "Users with disabilities") with the performance of the pilot for the specific population to the extent known/possible. If data are unknown or insufficient to ensure privacy, record this limitation using an 'X'.
6. *Optional:* For easy visual reference, use the rubric to the right to provide a color-coded performance evaluation in each cell or row.

Questions and tips for evaluation/interpretation:
1. *Did the pilot achieve what it set out to achieve?* Evaluate how the pilot performance (for both the general population and focus populations) compares to the targets.
2. *Did the pilot achieve equitable levels of service?* Evaluate how the pilot performance for focus populations differs from the performance for the general population.
3. *Did the pilot improve on the current transportation system?* Evaluate how the performance (for both the general population and focus populations) compares to the baseline.
4. *Did the pilot advance our goals?* Evaluate the performance in the goal areas that align with those identified on the pilot description page.
5. *What populations should be targeted in the next pilot?* Review multiple scorecards to determine which populations are being left out of our pilots and/or analyses.

A note about measuring equity: This scorecard is designed to measure equitable performance as a cross-cutting metric using two approaches: 1) it measures how equitably a pilot performs across different user groups, and 2) it includes metrics in most goal areas that are typically segregated in separate "equity" categories (e.g., digital accessibility, presence of a low-income fare/payment option, etc.).

Score	Quantitative Performance	Qualitative Performance	Focus Population Performance
🟢	At (±1%) or beyond target	Advancing	Same as general population (±5%)
🟡	1-10% short of target	Little or no progress	
🔴	>10% short of target	Negative impact	>5% worse than general population
⚪	Not applicable	Not applicable	
✖	No data, or data not reported due to insufficient sample size to ensure respondent privacy		

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Pilot Evaluation Scorecard

Date of review: _____   Name of reviewer: _____

Goal area	Performance metric	Intended directionality	Target for this pilot	Baseline (avg. for jurisdiction)	All users served by the pilot	Users of color	Users with disabilities	Users with low incomes	Users with limited English proficiency	Seniors	Youth	Women and girls	Immigrants and refugees	Users experiencing homelessness	LGBTQ+ users
Safety	**Number of serious incidents (deaths or serious injuries)** Total and per 1000 service miles	Zero													
	Number of minor incidents Total and per 1000 service miles	Low													
	Conflicts between vehicles and other road users Observed rate per 100 loads/unloads	Low													
	Perceived safety/security Average user rating out of 5	High													
Mobility	**Reliability of service** Percentage of trips completed within 5 minutes of time estimate	High													
	Trip request fulfillment time [Minutes]	Low													
	Average travel time [Minutes]	Low													
	First/last-mile connectivity Percentage of trips provided to/from transit stations	High													
	Average distance to pick-up/drop-off point [Feet]	Moderately low													
Customer Experience	**Customer satisfaction** Average user rating out of 5	High													
	Awareness of mobility options Average user rating out of 5	High													
	Ride completion rate % of trips completed	High													
	App-based service sign-ups Total number of sign-ups or downloads	High													
	Active users Percent of all users who have used the service at least once in the last three months	High													
Accessibility	**Physical accessibility** Percentage of vehicles/infrastructure that are wheelchair-accessible	High													
	Average request fulfilment time For users requiring wheelchair-accessible vehicle	Low													
	Digital accessibility Service availability for users without smartphones and/or data plans	High/Yes													
	Financial accessibility Service availability for users without credit/debit cards	High/Yes													
	Language accessibility Service and information offered in languages spoken by user population	High/Yes													

User-Level Goals

		What does success look like?		How does it compare?	How did the pilot perform for _____ ?										
What are you working towards? Goal area	**What are you measuring?** Performance metric	Intended directionality	Target for this pilot	Baseline (avg. for jurisdiction)	All users served by the pilot	Users of color	Users with disabilities	Users with low incomes	Users with limited English proficiency	Seniors	Youth	Women and girls	Immigrants and refugees	Users experiencing homelessness	LGBTQ+ users
Affordability	**Cost to rider** Total cost paid by user	Low													
	Price of service ratio Price of typical use vs. price of existing alternative	Low													
	Income-eligible/ low-income fare Is one offered? If so, what is it?	Yes/Low													
Sustainability and Climate Impact	**Vehicle miles traveled per person miles traveled** Total VMT divided by total PMT	Low (<1)													
	Emissions (GHG and tailpipe) per PMT Normalized emissions associated with the pilot	Low to zero													
Collaboration/ Partnerships	**Partnerships with representative organizations** How well did the pilot work with organizations that represent the target populations to develop and/or implement the pilot?	High													
	Partnerships with public sector How well did the lead agency work with public sector partners?	High													
	Partnerships with private sector How well did the pilot leverage private mobility providers?	High													
Accountability	**Net cost** Total cost of procurement (optionally, note number or cost of dedicated FTEs) minus any revenue from fares or charges (optionally, note number or cost of dedicated FTEs)	Low													
	Cost per rider Service cost divided by ridership	Low													
	Private investment leveraged Private dollars invested divided by public dollars invested	High													
	Meaningful and inclusive community engagement Community input collected and incorporated at ideation, design, and implementation stages	High													

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Common definitions of terms used in this scorecard

(Sources: U.S. Census and American Community Survey, Count Us In: Seattle/King County annual point-in-time count of persons experiencing homelessness)

- **Users of color:** refers to racial and (in some cases) ethnic minorities. Sound Transit: non-white users. SDOT and King County Metro: population that identifies as anything other than non-Hispanic white only.

- **Users with disabilities:** refers to individuals who self-identify as having one or more physical, mental, or cognitive disabilities.

- **Users with low incomes:** refers to individuals and households who make less than 100% or 200% of the federal poverty level (depends on jurisdiction and program).

- **Users with limited English proficiency:** refers to individuals who speak English less than "very well."

- **Seniors:** refers to individuals over 65 years of age.

- **Youth:** refers to individuals between 6 and 18 years of age.

- **Immigrants and refugees:** refers to individuals who are foreign-born.

- **Users experiencing homelessness:** refers to individuals who are living in a shelter designated to provide temporary living arrangements or have a primary nighttime residence that is not designed for or ordinarily used as a regular sleeping accommodation for human beings.

- **LGBTQ+ users:** refers to individuals who self-identify as lesbian, gay, bisexual, transgender, queer, or another related identity.

A note about privacy: To measure the performance of the pilot for these populations, agencies need to rely on known data about pilot participants (e.g., from fare type paid) and/or ask participants to share this information. As this information may be considered private or sensitive, it is essential that the information be provided voluntarily and that user privacy be protected (e.g., through aggregation and by not reporting data that could be used to identify an individual).