

Evaluation of School and Workplace Travel Plan SSA Programme

Appendices to Final Report
Department for Transport
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Dr Stephen Potter (Project Manager, The Open University)
Dr Ben Lane (Principal Researcher, The Open University)
Dr Graham Parkhurst (University of the West of England)
Dr Sally Cairns (University College London)
Dr Marcus Enoch (Loughborough University)

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13.1 Pre-Visit Questionnaire

The following document is completed by prospective workplace client organisations prior to receiving SSA from an advisor. Prospective school, hospital and local authority clients complete similar forms. Completed Pre-Visit Questionnaires (PVQs) are returned directly to AEAT for processing.

SITE SPECIFIC ADVICE PRE-VISIT QUESTIONNAIRE TRAVEL PLANS

Primary Contact:
Name and address of Site:

Telephone:
Fax:
E-mail:

Please return to:

TransportEnergy Best Practice
C/o AEA Technology Plc
Programme Office
Building 329
Harwell, Didcot
Oxfordshire OX11 0QJ
Fax 01235 433636

1. Organisation/ Site Overview

1a) Is your organisation committed to developing a travel plan? Please provide evidence of senior management backing and resources. If you can't provide any evidence please say why not.

1b) Who are the people within your organisation with responsibility for transport issues (e.g. Travel co-ordinator, Fleet manager, Finance Director, Human Resources Manager).

Name	Position	Responsibility

1c) Does your organisation exist on a single site or are there a number of different sites? Where are the other sites? Please indicate which site(s) you wish to be included in the Programme.

1d) Please describe the nature of the site and your status on the site. (e.g. Are there other organisations on the site? Are you the owner or a tenant? Do you manage your site facilities or does the landlord have responsibility for this?)

1e) How would you describe the location of the site? E.g: business park / city / large town / small town / rural - and for urban locations one of: centre / suburbs

1f) How many people work at each of your sites? (Show breakdown between employees and others, e.g. students).

1g) Roughly how many people work in other organisations on the same site (if applicable).

1h) Please give an indication of the working patterns at your site(s). (e.g. 7 days a week/ 5 days a week/ 5 days plus reduced weekend/ other (please specify), and 24 hours a day/ 2 shifts/ 1 shift/ other).

2. About Your Transport

Commuter Transport

2a) Do you know the commuting patterns of people working on site, e.g. from a travel survey? Please complete as much of the table below and attach any other relevant data you may have.

Mode	No. of Trips	% Split
Single-occupancy car		
Multi-occupancy car		
Motor cycle/scooter		
Bus/coach		
Rail		
Cycle		
Walking		
Other		

2b) Do you know your organisation's car parking costs such as rates, maintenance, etc? If yes, please describe. How many car parking spaces do you have?

Business Related Transport

2c) Where relevant to your operations, please complete as much of the table below as possible.

Activity	No. of vehicles	No. of Trips /yr.	Annual Miles	Annual Fuel Consumption	Annual cost
Staff on business (cars):					
Company cars					
Pool cars					
Other cars (staff owned/hire)					
Taxi					
Staff on business (other):					
Cycle					
Walking					
Bus/Coach					
Rail					
Air					
Services:					
Vans					
Fork lifts					
Other					
Freight Distribution: Own Account					
3rd party					

2d) Please highlight any particularly common journeys (e.g. staff travelling between 2 of your sites) and by what mode(s) are they undertaken

Other Transport Issues

2e) Do you have any other significant transport movements associated with your site, e.g. deliveries or visitors? Please provide details.

2f) Do you have an environmental transport policy? If yes Please provide details or attach a copy

3. About the Transport Issues you Face

3a) What do you perceive to be the main issues associated with your transport, e.g. parking, access to site, costs of business travel, seeking planning approval for new premises or site expansion. Please provide specific details below.

3b) Other than tackling the specific issues highlighted above, what do you perceive to be the main benefits of implementing transport initiatives, e.g. reduced costs, improved environmental performance, improved image within the community?

4. Addressing Your Transport Issues

4a) What steps, if any, have you taken to date to address your transport issues? Please provide details on strategic/management actions (e.g. appointing a travel co-ordinator, setting up of steering group, conducting a travel survey) as well as specific initiatives.

4b) Have you evaluated the impact of these initiatives? If yes please provide details.

4c) Have you been in touch with your local authority about transport issues? If so please provide contact details of the people you have dealt with.

4d) Have you co-operated or formed partnerships with any other organisations (e.g. other organisations in the same location, service providers, etc) in tackling transport issues? Please give details. If no, are there opportunities to do so?

4e) What specific issues would you like assistance with to help address your objectives? Please tick and give brief details:

Travel plan strategy issues:

Travel plan management e.g. roles and responsibilities, finance, etc	Yes / No	Details:
Design/analysis of travel surveys	Yes / No	Details:
Development of travel plan i.e. deciding on package of measures	Yes / No	Details:
Staff/union consultation (e.g. on terms and conditions & company car policy)	Yes / No	Details:
Staff Motivation & Marketing	Yes / No	Details:
Monitoring and Targeting	Yes / No	Details:

Commuter Initiatives:		
Car park management	Yes / No	Details:
Increasing use of public transport	Yes / No	Details:
Increasing use of cycling	Yes / No	Details:
Increasing walking trips	Yes / No	Details:
Increasing multi-occupancy car trips	Yes / No	Details:
Home-working	Yes / No	Details:
Compressed working week	Yes / No	Details:
Business Travel Initiatives:		
Business travel policy	Yes / No	Details:
Reducing business mileage	Yes / No	Details:
Reducing the fuel consumption of the vehicle fleet	Yes / No	Details:
Reducing vehicle emissions e.g. by using Alternative Fuels	Yes / No	Details:
Other (specify)	Yes / No	Details:

4f) Please give us your ideas on how the consultant’s time should be put to use for you to gain the most benefit. Possible options include: one-to-one or group meetings to provide advice and guidance on relevant issues; facilitation of workshops/focus groups to develop strategies and/or initiatives; and on-going ‘distance’ mentoring.

4g) Your local authority should also be able to provide you with support and information to help you develop your travel plan. We will contact them to let them know you are receiving help from us. They may wish to get involved, e.g. by attending some of the meetings with our advisor. Would this be acceptable to you? If no, please tell us why not?

4h) Are there any other issues you would like to bring to our attention prior to receiving assistance?

13.2 Advisor Contract Specification

The following document is the current advisor contract specification that forms the basis of the contract between the SSA Managing Contactor and each SSA Advisor. This document was introduced in August 2002, replacing an earlier version.

1. Introduction

The Energy Efficiency Best Practice Programme (EEBPP)¹ is key part of the Government's commitment to meeting the UK's carbon dioxide reduction targets. The EEBPP provides advice and support on energy efficiency measures in three key sectors: industrial, buildings and transport energy efficiency. Most of the day-to-day management of the transport sector is sub-contracted to a Managing Contractor.

The transport sector of the EEBPP seeks to raise awareness of, and provide information and advice on travel plans for all types of organisations as well as 'green' fleet management for company car fleets and sustainable distribution in the road haulage sector. The objective of the EEBPP's travel plan related information and support services is to help organisations implement travel plans and related 'green' transport initiatives. One of these services is Site Specific Advice (SSA) which covers the provision of free help and advice from an expert advisor to individual organisations at their site. A related, supporting service is the Environment and Energy Helpline, through which organisations can receive up to two hours of distance advice to help with specific questions or problems.

2. Objectives

The main objective of the SSA and distance advice elements of the EEBPP's travel plan related information and support services (the Programme) is to provide practical, focused site specific assistance to businesses, schools and other organisations to help them with the development and implementation of travel plans and related 'green' transport initiatives.

Organisations can receive up to 5 days of an advisor's time to help with the development and implementation of their travel plan. More time (up to 10 days) may exceptionally be offered for very large organisations or situations where there are a number of organisations working together on a joint plan. Less time (about 3 days) may be offered in the first instance to small organisations working in isolation.

A secondary objective of the Programme is to provide assistance to organisations requesting help through the Environment and Energy Helpline. This will consist of up to two hours of 'distance advice', arranged through the Managing Contractor.

3. Operation of the Programme

On receipt of a request for assistance, the following procedures will be used by the Managing Contractor to facilitate the effective operation of the Panel:

For Site Specific Advice:

- Managing Contractor will issue an information pack, including a pre-visit questionnaire, to establish the needs and the level and type of assistance required.
- Managing Contractor will contact the relevant local authority for further background information.

¹ Now the TransportEnergy Best Practice Programme. For more information about the scheme, contact can be made through the following website: <http://www.transportenergy.org.uk/bestpractice/>.

- Managing Contractor will then select a Panel member to carry out the site visit, with the selection being based on a number of factors including relative locations, matching expertise and balancing resource assignments.
- The Panel member will establish the aims and objectives of the assistance through initial communication with the client and their local authority.
- The Panel member will then prepare ideas and materials necessary for assistance and visits recipient.
- The Panel member will undertake up to 3 visits to recipient to progress their travel plan.
- The Panel member will prepare an assignment report, including action plan, for the client. A copy of the report will also be provided to the Managing Contractor and, if the recipient agrees, to the relevant local authority.
- Managing Contractor will issue a feedback questionnaire to the client and identifies any further requirements for notification to local authority.

For Distance Advice:

For distance advice received via the Environment and Energy Helpline, the Managing Contractor will refer calls on to a Panel member with an Order to provide up to 2 hours distance advice.

4. Description of Work

All work carried out by a Panel member shall be agreed, in advance, with the Managing Contractor. Following receipt of a Warrant for a SSA assignment, the Contractor shall:

- Carry out a preliminary review of information supplied by the school/business/ leisure site. Make contact with the organisation to agree objectives of the visit, see what information might be available, and the likely range of contacts that should be involved (e.g. travel plan champion/travel co-ordinator, fleet manager, environmental manager, senior/finance manager).
- Contact the client's local authority to find out if there are any other issues that they should be aware of, e.g. relevant planning applications. In many instances it may be helpful for the relevant local authority officer to attend the site visits, as long as the client organisation is in agreement.
- Develop any necessary ideas and materials for use on the site visit. It will be the responsibility of the Contractor to request information on access, security and safety for the visit.

The Site Visit:

- Each SSA assignment should involve at least one site visit, but may entail up to three.
- The assistance provided to businesses, schools and other organisations must be relevant to developing and/or implementing a travel plan and related 'green' transport initiatives.
- Examples of the type of assistance include:
 - Advice on the design, implementation and analysis of staff or pupil travel surveys;
 - Advice on establishing and measuring the costs and benefits of travel plan initiatives;
 - Facilitation of workshops to develop a strategy for development of a travel plan;
 - Facilitation of focus group/workshops to develop specific initiatives;
 - Advice on the development/implementation of the most appropriate/cost-effective initiatives;
 - Advice on the development and implementation of a marketing strategy for the plan;
 - Signposting to other sources of assistance, e.g. local authority officers, good practice literature, marketing materials, etc.;
 - Advice on the monitoring and evaluation of travel plans;
 - Advice on setting up a steering group and or working group;
 - Assistance with negotiations with public transport operators.
- The type of assistance employed will ultimately be the decision of the organisation or school, although guidance will be provided on how they might make the best use of the Contractor's time. The objectives and requirements of the technical assistance will be developed by the recipient, in consultation with the Contractor and the local authority, as appropriate.

Following receipt of an Order for 'distance advice' from the Managing Contractor, the Contractor shall:

- Contact the organisation or school by telephone to discuss the problem in detail and assess, on the basis of the Contractor's knowledge and experience, possible solutions to the problem, or further sources of information and help as appropriate. The Contractor will then write a summary of the problem and the advice offered. These enquiries are expected to take no more than 2 hours to complete and will require no travelling.
- Contractors will be expected to maintain an up to date knowledge of local initiatives, support available to organisations, particularly SMEs, and possible local sources of funding.

5. Reporting

For Site Specific Advice:

For a SSA visits the Contractor shall prepare and submit a report for the Managing Contractor **no later than two weeks** following completion of the site visit/final site visit. Where there is to be more than one visit, an interim site visit report will be required **no later than 1 week following the initial site visit** which reports on progress and outlines the next steps.

The content and format of the final site visit report shall follow guidelines agreed with the Managing Contractor. It is expected that no report would be more than 8 pages in length plus annexes. The report shall in all cases:

- Give an analysis of the problem, including particular issues facing the organisation or school;
- Provide guidance on solutions / recommendations;
- Include a bullet point action plan that the organisation or school can implement.

The balance of the report will reflect the details of the specification for the visit provided. Where the Contractor recommends that her/ himself or his/her company may be able to carry out the follow up work, at least two other alternative consultancies must be recommended.

For Distance Advice:

For distance advice the Contractor will write a summary of the problem and the proposed advice on the fax/e-mailed Order/enquiry form. This should then be transmitted on to the caller and the Managing Contractor.

6. Deliverables

For Site Specific Advice: The Contractor shall submit one electronic datafile of a site visit report in Microsoft Word 6.0/95 format. The Contractor shall submit 4 hard copies of the final site visit report and an electronic datafile of key information in Microsoft Word 6.0/95 format.

For Distance Advice: For distance advice assignments, the Contractor shall submit a fax copy or an electronic datafile in Microsoft Word 6.0/95 format of the short report.

7. Timescales and Effort

It is estimated that support to a maximum of 5 days, subject to the exceptions highlighted above, will be required for each of the SSA assignments. This effort will include the visits (usually up to 3) and the time needed to prepare for the visits and for preparing the site visit reports and travelling to and from the site. No more than one full day may be booked for any one site visit, regardless of any travelling time carried outside of normal working hours.

The initial site visit report should be received **no later than 1 week** following the initial site visit. The final site visit report should be received **no later than 2 weeks** following the final site visit. The short report for the distance advice assignment should be received **no later than 1 week** following completion of the assignment.

13.3 Report Writing Guidelines

The following guidelines were re-issued to advisors by AEAT on 8th October 2002 in order to clarify the interim and final SSA report writing guidelines that were first issued in 2001.

Purpose of Interim/Final Report

The objective of SSA is to assist sites in overcoming problems related to the development/implementation of their travel plans AND to enable them to independently carry on working on their travel plans.

The purpose of the report(s) is: (i) primarily to summarise the consultant's advice to allow the site to carry on working independently on the development/implementation of the travel plan; (ii) also to log what advice the site requested and what the consultant delivered.

The report should NOT provide background information about the site and the assignment for the benefit of AEA Technology or DfT. This means, avoid lengthy descriptions of points well known to the site, but raise the key issues that are relevant to the advice sought.

The final report shall in all cases:

- Give a (short) analysis of the problems/ particular issues faced by the organisations;
- Provide detailed recommendations and guidance on solutions;
- Include a bullet point action plan that the organisation can implement during the assignment and following completion of the consultant's assignment.

Structure and Length of Report

What follows is an outline structure for the report (as presented at workshops in May and October 2001) and an INDICATION of the length of each section. Usually reports should be no longer than 8 pages PLUS annexes:

1 Introduction (usually no more than 1 page)

- Objective of the assignment;
- Site consultant contact details;
- Date of assignment, meetings;
- Status of assignment (e.g. 1st visit, final report).

2 Context (usually no more than 1-2 pages)

- Type of company/site;
- Brief and concise description of current situation;
- Status of TP activities.

3 Key Issues (about 2 pages)

- Description of issues relevant to the assignment including assessment/conclusions.

4 Action Plan (main body of the document)

- Description of recommended measures that allows the site to further develop/ implement the travel plan:
 - Clear and detailed actions and procedures;
 - Action owner;
 - Timing.

5 Programme of Work (no more than 1/2-1 page)

- Next actions for the consultant;
- Deliverables;
- Timing.

6 Annex (length depending on deliverables)

- Copy of the Pre-Visit Questionnaire (PVQ);
- Copy of presentation material;
- Analysis of survey, etc.;
- Any other deliverables (copies of ad-hoc advice given by email, fax unless it is incorporated in the main body of the report).

Interim Report:

An interim report should be provided following the initial site visit. Following the initial meeting you should be able to provide information under sections 1, 2, 3 and 5 of the above report structure. During the course of the assignment the interim report can then be developed into the final report by amending the existing sections as necessary and by adding to sections 4 and 6.

AEA Technology requires only an electronic copy of the interim report, but we require two hard copies of the final report.

And finally:

There will be instances where the consultant is asked to provide ad-hoc advice on the phone and via email and to comment on existing travel plan documents. Also, consultants may be asked to lead focus groups, give presentations at board meetings, or help develop surveys for the site.

Even in these cases, we would expect a report along the lines of the above "model structure". The action plan may be much shorter, but, to stick with the example of the consultant that leads a focus group, s/he may recommend how to utilise the results of the focus group to progress the travel plan - this should form part of the report. Also, if the consultant provided ad-hoc advice this should be summarised in the final report.

13.4 Client Discussion Guide

Structured interviews with SSA clients were conducted using the following Client Discussion Guide. The data generated was subsequently analysed, the results of which are discussed in the Final Report.

Case no.:..... Name of interviewer:.....

Date and time of the interview:.....

Method of interview: In person By phone

Name of client organisation/school:.....

Name and organisation of Advisor:.....

Before the interview

- Please **roughly complete questions** 1, 2a, 4, 5, 9, 10, 15e+g, 19, 25, 26, 32, 34a, 35a, 36c and 38, using the PVQ, feedback form and final report. (For some cases, some of these documents will be unavailable)

During the interview

- Please **ask the interviewee all the questions** on the form (except 19), even those already completed in rough using the documentation – to make sure that the interviewee’s opinion corresponds with the documentation. Please clarify any discrepancies.
- In many cases, you may find it easiest to ask the question, and **note down the response in the dotted line sections** in the left hand column, and carry out any categorisations afterwards.
- Please **write down any useful quotes** from the Client which might be valuable to give in the final report.

After the interview

- Please complete a clean copy of the form (either on paper or electronically) and **categorise all relevant answers**, according to the interviewee’s responses. (Note – if the interviewee’s response does not correspond with the documentation, please highlight this, but code according to the interviewee).
- Apart from questions with a ‘yes/no’ or ‘1..2..3..4..5’ type answer, please **tick all categories that apply**.
- Please **specify, whenever ‘other’ is ticked**.
- Please **include any information which is not covered by the categorisations**
- **If the interviewee is unable to decide between two scores** (e.g. ‘4’ or ‘5’), please record the score as half way between (e.g. 4.5)

If not already obtained, **please start the interview** by requesting copies of

- *The latest version of the travel plan.*
- *Any travel plan type document that existed prior to receiving site-specific advice.*

1. How did you hear about the SSA ?
(check feedback form 1)

.....

Please tick all that apply
 Publicity materials – e.g. website, leaflets
 Conference, seminar or professional organisation like ACT

 Local authority
 Someone else who received advice
 Work colleague
 Friend /relative
 Other (please specify)

2. a) Had you been doing any kind of travel planning before seeking SSA ? (check PVQ 4a)
 b) If yes, approximately how long had you been doing travel planning before seeking advice ?

Yes No

_____ months

3. Did you request SSA as soon as you knew it was available ?

.....

Yes No

4. Was there a particular reason for seeking help from the SSA at the time that you did ? (check PVQ – 4f and feedback form-2)

.....

No specific reason – just discovered SSA was available
 OR *Please tick all that apply*
 Staff travel survey starting or finishing
 Meeting or focus group due
 Problems with senior management commitment
 Needed help with starting travel plan
 Unclear how to progress existing travel plan
 Other (please specify)

5. a) Before receiving SSA, had you obtained any other advice or worked closely with others on developing or implementing travel measures ?
 b) If so, where or who did this advice come from? (check PVQ 4c and 4d)

.....

Yes No

Please tick all that apply
 Local authority
 Reference materials
 Professional organisations e.g. the Association of Commuter Transport (ACT), Sustrans, Transport2000
 Other consultants
 Other organisations in a similar position
 Public transport operators
 Other (please specify)

6. When you sought SSA, did you want the Advisor to help with specific tasks, or did you want them to give leading guidance on how to develop the travel plan, or both?

.....
.....

Specific tasks
Help lead
Both

7. On a scale of 1-5, where 1 is negative and 5 is positive, how clear did you find the process of applying for help, in terms of the information you received and the forms you had to fill in ?

.....
.....

Negative 1..2..3..4..5 Positive

8. You were asked to complete a Pre Visit Questionnaire to help the Advisor– do you have any negative or positive comments, or other opinions about this ?

.....
.....
.....

B. Nature of the interaction

9. Approximately how long was the period of receiving advice ? (check dates of initial and final reports)

_____ months

10. How many site visits did the Advisor make? (check final report)

_____ visits

11. Did you have any other useful interaction with the Advisor ?

Yes No

.....

12. What sort of activities did the Advisor undertake with you?

Please tick all that apply

- Survey implementation/analysis
- Site audit/analysis of site conditions
- Negotiation with management
- Facilitation of meetings with staff, students or parents
- Liaison with external organisations
- Preparation of teaching materials
- General mentoring
- Other (please specify)

.....

13. Did you feel that the Advisor was supportive ?

Yes No

.....

14. Apart from the named Advisor, were any other people from the Advisor's company involved?

Yes No

.....

C. Evaluation of the advice

15. On a scale of 1 to 5, where 1 is negative and 5 is positive, how would you rate the following (where relevant, ask “why”, particularly for negative comments):

a) the Advisor’s understanding of your organisation	Negative 1...2...3...4...5 Positive
b) the Advisor’s understanding of your local context, such as the local area, local transport situation etc.	Negative 1...2...3...4...5 Positive
c) the Advisor’s general knowledge of implementing travel plans	Negative 1...2...3...4...5 Positive
d) the amount of interaction you had with your Advisor	Negative 1...2...3...4...5 Positive
e) the quality of the final report that you received from the Advisor? (check feedback form 4)	Negative 1...2...3...4...5 Positive
f) The amount of Advisor time available through the SSA programme ?	Negative 1...2...3...4...5 Positive
g) Your overall satisfaction with the SSA (check feedback form 6)	Negative 1...2...3...4...5 Positive

16. a) Would you have liked more Advisor time ?
b) If yes, how much and what for ?

.....
.....

Yes No

17. a) Was there help from the advisor that you were expecting but did not receive?
b) If yes, what ?

.....
.....

Yes
No
Didn't know what to expect

18. Did the Advisor provide information about where to get further help and resources ?

.....
.....

Yes No

D. Impact of the interaction

19. [Do not ask the client] List the main recommendations from the final report

.....
.....
.....
.....
.....
.....
.....
.....

20. What were the main recommendations of the Advisor ? (cross check with the list given in question 19)

.....
.....
.....
.....
.....

21. a) Did you successfully implement any of the Advisor's recommendations ?
 b) If yes, which ones ?

Yes No

.....

22 a) Were there any of the Advisor's recommendations that you thought were inappropriate ?
 b) If yes, which ones and why ?

Yes No

.....

23 a) Were there any of the Advisor's recommendations that you would have liked to implement but were unable to ?
 b) If yes, which ones and why ?

Yes No

.....

24. Overall, on a scale of 1-5, where 1 is negative and 5 is positive, how would you rate the appropriateness of the Advisor's recommendations to your situation?

Negative 1...2...3...4...5 Positive

.....

25 a) Overall, do you think that there have been travel planning developments or changes which have *only* taken place because of the SSA? (check feedback form 5)
 b) If yes, what were they ?

Yes No

.....

26. a) Do you think that there have been travel planning developments or changes that have taken place *more quickly* as a result of the SSA? (check feedback form 5)

Yes No

b) If yes, what were they ?

.....

27 a) Did your knowledge and understanding of travel planning increase due to the involvement of site specific Adviser

Yes No

b) If yes, what were the particular things that you learnt ?

.....

28. Overall, on a scale of 1 to 5, where 5 is the most positive, how valuable do you think the SSA was in *improving your travel plan* ?

Negative 1...2...3...4...5 Positive

.....

.....

29. What was the most beneficial aspect of the SSA ?

.....

.....

.....

E. Context of the advice

“Next are a few questions to help us understand the context in which you received site specific advice”

30. Who initiated your travel plan ?

.....

Please tick all that apply
For companies/hospitals:

- Local authority
- Senior management
- Particular department (please specify)
- Staff
- Other (please specify)

Please tick all that apply
For schools:

- Local authority
- Staff
- Students/pupils
- Parents

31. Was your travel plan a voluntary initiative, or was it required by an external organisation (e.g. planning permission requirement)?

.....

.....

32. What are your travel plan's main objectives? (check PVQ 3a and 3b)

.....

33. a) When asking for site specific advice, did you have specific staff resources dedicated to developing and implementing your travel plan ? (check PVQ1a)

.....

.....

b) Now, do you have specific staff resources dedicated to developing and implementing your travel plan ?

.....

.....

School governors
 Other (please specify)
Please tick all that apply
 For local authority:
 Senior management
 Specific department (*please specify*)
 Elected members
 Staff
 Other (*please specify*)

Voluntary
 Requirement
 Both

Please tick all that apply
 Reduce traffic
 Address parking issues
 Improve alternative travel options
 Improve environmental performance
 Improve attractiveness of organisation/school to staff and/or students
 Improve health of staff and/or students/pupils
 Meet planning requirement/secure planning permission
 Meet requirements of environmental standards, such as 'EMAS' or 'ISO14001'
 Other (please specify)

Yes No

Yes No

c) If no, who is currently responsible for developing and implementing your travel plan ?

.....

34.a) When asking for site specific advice, did you [and/or – for schools - the local authority] have a budget for the travel plan/ travel measures? (check PVQ1a)

Yes No

b) If yes, what was it ?

.....

c) Now, do you [and/or – for schools – the local authority] have a budget for the travel plan/travel measures ?

Yes No

d) If yes, what is it ?

.....

35. On a scale of 1-5, where 1 is negative and 5 is positive, how would you rate

a) senior management commitment [including - for schools - head teacher commitment] towards your travel plan before receiving SSA (check PVQ1a) ?

Negative 1..2..3.. 4..5 Positive

.....

.....

b) senior management commitment [including - for schools - head teacher commitment] towards your travel plan now?

Negative 1..2..3.. 4..5 Positive

.....

.....

36. On a scale of 1-5, where 1 is negative and 5 is positive, how would you rate:

a) [for non local authorities] the helpfulness of the local authority in developing your travel plan

Negative 1..2..3.. 4..5 Positive

.....

.....

b) the willingness of local public transport operators to be involved in your travel plan

Negative 1..2..3.. 4..5 Positive

.....

.....

c) the opportunities for working with other organisations in the local area who are developing travel plans (check PVQ 4d)

Negative 1..2..3.. 4..5 Positive

.....
.....

37. During the period of receiving the advice, were there other circumstances or influences that particularly helped or hindered the role of the Advisor ?

.....
.....

F. Other comments

38. Do you have any other comments on the work your Advisor did for you? (check feedback form 7)

.....
.....

39. Have you subsequently employed the Site Specific Advisor (or another consultant) for further Travel Plan advice?

Yes No

.....

40. Given your experience, is there any way you would like to see the SSA programme changed for future users?

.....
.....
.....

13.5 Advisor Discussion Guide

Structured interviews with SSA advisors were conducted using the following Advisor Discussion Guide. The data generated was subsequently analysed, the results of which are discussed in the Final Report.

Name of interviewer:.....

Date and time of the interview:.....

Method of interview: In person By phone

Name and organisation of Advisor:.....

Before the interview

- Please **complete the introductory sections** on this page, and pages 4 and 10.
- Please **roughly complete questions** I-8, II-8 , I-16a+b and II-16a+b using the clients' PVQs.

During the interview

- Please **ask the interviewee all the questions** on the form, even those already completed in rough using the documentation – to make sure that the interviewee's opinion corresponds with the documentation. Please clarify any discrepancies.
- In many cases, you may find it easiest to ask the question, and **note down the response in the dotted line sections** in the left hand column, and carry out any categorisations afterwards.
- Please **write down any useful quotes** from the Advisor, that might be valuable to give in the final report.

After the interview

- Please complete a clean copy of the form (either on paper or electronically) and **categorise all relevant answers**, according to the interviewee's responses. (Note – if the interviewee's response does not correspond with the documentation, please highlight this, but code according to the interviewee).
- Apart from questions with a 'yes/no' or '1..2..3..4..5' type answer, please **tick all categories that apply**.
- Please **specify, whenever 'other' is ticked**.
- Please **include any information which is not covered by the categorisations**
- **If the interviewee is unable to decide between two scores** (e.g. '4' or '5'), please record the score as half way between (e.g. 4.5)

A. General: Programme Management

“Starting with the general management of the site specific advice programme...”

1. Were the instructions about the Advisory role clear and straightforward ?	Yes	No
.....		
2. a) Was there any additional information or training that would have helped you to undertake your Advisory role ? b) If yes, what ?	Yes	No
.....		
3. Were you clear about the final report requirements ?	Yes	No
.....		
4. Would you have liked further information about the final report, such as a checklist of things to be included ?	Yes	No
.....		
5. a) Is the payment process for Advisors appropriate (for example, in terms of when you receive the money) ? b) Are there any changes to the payment process that would be helpful ?	Yes	No
.....		
6. On a scale of 1-5, where 1 is negative and 5 is positive, how well-managed is the SSA programme?	Negative 1...2...3...4...5 Positive	
.....		
7. a) Are there any improvements you would suggest to the administration of the SSA programme b) If yes, what	Yes	No
.....		

Client I:

Case no.:.....Name of client organisation/school:.....

Name and organisation of Advisor:.....

Name of interviewer:.....

Date and time of the interview:.....

Method of interview: : In person By phone

“Next, I’d like to ask you about your experience at particular clients, starting with.....”

B. Client I: Context

I-8. At <client>, was it correct that you reported to....
(complete using PVQ – front cover)

.....

I-9. a) Do you think this was the appropriate person to be dealing with in the organisation? b) If not, who would have been	Yes	No
--	-----	----

.....
.....

I-10. Did you receive enough information about the site before arriving ?	Yes	No
---	-----	----

.....
.....

I-11. Is there any additional information that you would have liked ?	Yes	No
---	-----	----

.....
.....

I-12. Would you suggest any changes to the PVQ ?

.....
.....

I-13. a) Do you think you were contacted at the most appropriate stage of the travel plan process ? b) Please explain your answer	Yes	No
--	-----	----

.....
.....

C. Client I: Nature of the interaction

I-14. Briefly, what sort of activities did you undertake at this client?

.....

Please tick all that apply

- Survey implementation/analysis
- Site audit / analysis of site conditions
- Negotiation with management
- Facilitation of meetings with staff, students or parents
- Liaison with external organisations
- General mentoring
- Other (*please specify*)

I-15. a) Was anyone from your organisation other than yourself involved in this project?

b) If so, how much time did you spend on the project, compared with other people from your organisation ?

c) If so, what activities did the other person (or people) undertake ?

.....

.....

Yes No

_____ days of named Advisor

_____ days of other

I-16. a) Was the Local Authority involved in the travel plan process ?
(check PVQ 4c)

If no:

b) Why not, and would this have been useful ?

.....

.....

If yes:

b) What was the name of the primary contact at the Local Authority, and what was their post (eg travel plan co-ordinator, development control officer *etc.*)?

.....

.....

c) Briefly, what was the Local Authority's main role in the travel plan

.....

Yes No

- General support
- Promoting contact with other organisations in the local area
- Help with surveys

.....	Provision of off-site infrastructure such as bus or cycle lanes Other <i>(please specify)</i>
d) On a scale of 1-5, where 1 is negative and 5 is positive, how useful was their involvement ?	Negative 1...2..3..4..5 Positive
.....	
.....	
e) Could the local authority involvement have been increased or enhanced ?	Yes No
.....	
.....	
f) Were you responsible for involving the local authority in the process ?	Yes No
<i>If yes:</i>	
e) At what point did you suggest involving the local authority and why ?	Beginning of SSA period During SSA period End of SSA period At time of specific event <i>(please specify)</i>
.....	
.....	

D. Client I: Assessment of the interaction:

I-17. On a scale of 1-5, where 1 is negative and 5 is positive, how would you rate:

a) The seriousness of the client organisation in developing an effective travel plan at the start of receiving SSA

Negative 1...2...3...4...5 Positive

.....

.....

b)The seriousness of the client organisation in developing an effective travel plan at the end of receiving SSA

Negative 1...2...3...4...5 Positive

.....

.....

c) The amount of time that you could spend on this client

Negative 1...2...3...4...5 Positive

.....

.....

d) The way in which they reacted to your recommendations

Negative 1...2...3...4...5 Positive

.....

.....

I-18. Please explain any reasons for negative reactions to your recommendations

.....

.....

I-19. a) Do you think the client had a sufficiently clear idea of what they wanted from you?

Yes No

b) If not, could this have been addressed in any way ?

.....

.....

I-20 a) Do you think the client's expectations and requirements were realistic ?

Yes No

b)If not, why not and could this have been addressed in any way ?

.....

.....
 I-21. Were there any activities that you would have preferred to undertake with the client which would have been a better use of your time ?

Yes No

.....
 I-22. Were there any significant problems in the client's arrangements for your involvement ?

Yes No

.....
 I-23. Were there any other obstacles or difficulties that you faced ?

Yes No

E. Client I: Impact of the interaction

I-24. On a scale of 1-5, where 1 is negative and 5 is positive, how would you rate:

- a) The quality of the client's travel plan before you became involved
- b) The quality of the client's travel plan at the end of the SSA period

Negative 1...2...3...4...5 Positive

Negative 1...2...3...4...5 Positive

.....
 I-25. a) Do you think there are travel planning developments or changes that have *only* taken place because of the SSA?

Yes No

b) If yes, what were they ?

.....
 I-26. a) Do you think there were travel planning developments or changes that took place *more quickly* due to the SSA?

Yes No

b) If yes, what were they ?

I-27. What do you think was your most significant impact on the development of the client's travel plan?

.....
.....

I-28. Were there any positive lessons from working with this client that others might learn from?

.....
.....

I-29. Do you have any other comments upon this specific client case study?

.....

F. General : Overall evaluation

“Returning to consider the Site Specific Advice programme as a whole...”

30. a) Do you feel that 5 days of SSA can make a real difference to an organisation's travel plan?

Yes No

.....
.....

If the Advisor thinks more time is required,
b) What would more time be useful for ?

.....
.....

c) Do you have any further comments on the time allocation ?

.....
.....

31. a) Have any SSA clients subsequently employed you (or another consultant from your organisation) for further Travel Plan advice?
b) If yes, please give details

Yes No

.....
.....

32. Apart from the SSA programme, approximately how many travel plans have you been involved in:
a) Designing

b) Implementing

33. a) Are there any improvements you could suggest to the design and operations of the SSA programme?

b) If yes, what are they?

Yes No

.....
.....

34. Do you have any other comments on the best way to help organisations develop travel plans?

.....
.....
.....

13.6 Documentation Analysis Guide

The main documentary analysis of SSA advisor reports was conducted (by the SSA Evaluation team) using the following document analysis guide. The data generated was subsequently analysed, the results of which are discussed in the Final Report.

Name of interviewer: Case no.:.....

Name of client organisation/school: Name and organisation of Advisor:.....

1. Please list all documentation available for this client organisation, and the date that each document was produced.

.....

A. Client expectations

2. According to the PVQ (question 4e), in which areas was advice sought?

Management
Travel surveys
Designing travel plan package
Staff/union/pupil consultation
Motivation/marketing
Monitoring/targeting
Car park management
Public transport
Cycling
Walking
Multi-occupancy car use

Home working
Compressed working
Business or employee travel policy
Business mileage
Fuel consumption
Vehicle emissions
Fuel and emissions
Marketing services
Other (please specify)

(For non schools, there will be some of the following additional categories.)

3. According to the PVQ (question 4f) was there particular help that the organisation wanted from the Advisor?

.....

- Help with staff travel survey
- Meeting or focus group facilitation
- Assistance in gaining support from senior management
- General guidance on ‘where to start’ or ‘where next’
- Assistance in working with external organisations
- Assistance with implementing travel plan measures
- Other

B. Format of reports from the Advisor

	<i>Interim report</i>	<i>Final report</i>
4. Does the document contain a:		
a) Contents list	Yes No	Yes No
b) Initial or executive summary	Yes No	Yes No
c) A map of the location to clarify site specific issues	Yes No	Yes No
5. Is the report clearly structured, such that, on flicking through, it is easy to identify the location of material that:		
a) describes the situation and problems facing the organisation / school	Yes No	Yes No
b) provides recommendations/solutions/next steps for the organisation	Yes No	Yes No
6. Are there any spelling, grammatical or other typing/formatting errors which detract from the quality of the report ?	Yes, a substantial number of errors Some errors but not major problem Few or no errors	Yes, a substantial number of errors Some errors but not major problem Few or no errors
7. Number of pages		
8. Approximate number of pages of core content (excluding graphics, photos, travel surveys, additional documentation such as the PVQ, and appendices)	_____	_____
	_____	_____

C. Report Content

	<i>Interim report</i>	<i>Final report</i>
9. From reading each report, how clear is your understanding of the site and the key issues to be addressed there ?	<p>Clear understanding</p> <p>Some information gained, but some details/issues unclear</p> <p>Poor understanding</p>	<p>Clear understanding</p> <p>Some information gained, but some details/issues unclear</p> <p>Poor understanding</p>
10. Does the Advisor include recommendations for the client ?	<p>Yes No</p>	<p>Yes No</p>
11. How clear are any recommendations about:		
a) Next steps	Clear Some info. Unclear	
b) Longer term goals	Clear Some info. Unclear	
c) Timescales for action	Clear Some info. Unclear	
d) Who is responsible for each action	Clear Some info. Unclear	
12. Do the reports highlight any opportunities for working in partnership with local authorities, public transport operators, or other relevant organisations ?	<p>Clear information, likely to be of value to the client, or clear reason for not including such information</p> <p>Some mention, but probably worthy of amplification</p> <p>No mention/consideration</p>	

D. Overall Evaluation

13. In brief, how would you define the main purpose and aims of the final report ?

.....

14. Given the needs identified by the client on the PVQ, had you been the client, how positively do you think you would have rated the final report ?

Negative 1...2...3...4...5 Positive

15. The brief given to the Advisors specifies that their final report should:

- a) Give an analysis of the problem, including particular issues facing the organisation or school;
- b) Provide guidance on solutions / recommendations;
- c) Include a bullet point action plan that the organisation or school can implement.

Negative 1...2...3...4...5 Positive

According to these criteria, how positively would you rate the final report ?

Negative 1...2...3...4...5 Positive

Negative 1...2...3...4...5 Positive

16. Are there any particular features of good or bad practice that it is useful to highlight ?

.....

.....

17. Any other comments ? (eg. ways in which the report could have been usefully improved)

.....

.....

13.7 Implementation of Recommendations

The following table shows details of the advisor's recommendations, and those that have been implemented, for each SSA Travel Plan analysed. (Infrastructure measures are shown in bold.)

	Advisor's Recommendations <i>[According to Final Report]</i>	Implementation of Recommendations <i>[According to Client]</i>
Hospital	Not stated	In process of implementation. There has been a time lag between advice, and getting authorisation to go ahead by trust board.
Hospital	Early wins: Ridesharing, cycling, walking for health, journey planning, staff induction journey planning, raise awareness. Staff need to pay for parking, for equity; funds raised used to improve personal security on site, support cycling and walking initiatives for staff, subsidise public transport costs, improve car parks for patients, visitors and staff. Implement bicycle user group, car sharing etc.	Bicycle users group
Hospital	Targets to be set for vehicle use. Improvements to bus services. Introduction of a car share scheme. Improvements to cycle facilities. Parking permits system. Transport strategy booklet.	Additional bus routes.
Hospital	Develop clear and timetabled marketing strategy Win endorsement of Trust Board. Ensure sufficient resources to market TP once implemented. Engage public transport operators in productive relationships Convince City Council that the TP will be effective and sustained in the longer term. (Plus several other recommendations).	Travel plan formally endorsed by Trust Board in October 2002 and now implementing it across the site. Now have a number of measures such as walking, cycling, car sharing, etc.
School	Set up working party (2001). Walking on Wednesdays initiative (WOW) (2002). Pedestrian training. Cycling initiatives and new bike cage/shelter (2003). Set up car share database (2002). Conducted regular 'dipstick' hands up monitoring survey (ongoing). Highway works near school (2003). Consider extension to cycle path (2006). New Park & Ride bus route (2002).	Set up working party. Walking on Wednesdays. Pedestrian Training. Cycle Training. Car share database. New bus route (now discontinued).
School	Teacher led pupil travel survey. Parent consultation & survey. Develop TP from survey information. Promote walking & cycling where appropriate. Establish contact with Wiltshire CC. Market TP through newsletter, displays, and presentations. Incorporate travel issues in curriculum. Explore feasibility of Walking Bus, New funding bid for new footpath.	Conducted travel surveys. Developed TP based on survey information. Established links with Wiltshire CC. Incorporated travel issues in curriculum.
School	Engineering measures. General improvements for cyclists. School management measures	Pedestrian phase lights; cycle stands; cycle training. However, key engineering measures still with council
School	Identify TP coordinator from within school community. Set up TP working group. Identify physical improvements to encourage walking & cycling. Make second application for pavement upgrade. Raise awareness of TP among school & wider community. Investigate feasibility of Walking Bus scheme. Investigate feasibility of car sharing scheme.	TP working group set up. Installed pavement in village to and from school. Walking bus trialled (insurance issue to be solved). Travel and Environment issues part of curriculum. Cycle proficiency training (already happening pre SSA).
Company	Car Parking charges. Public transport information website. Financial incentives for cycling, public transport. TP hierarchy with walking and cycling at top. Car sharing.	We suggested a pay and display scheme, but this was rejected by senior management. We have also tried car sharing, but this hasn't really taken off.
Hospital	Recommended actions for cycling /walking /motorcycling, public transport, car travel/parking, working in partnership, flexi hours & home working	Car share scheme

School	TP integrated with all aspects of school policy. Walking initiatives - Walking on Wednesdays, Safe Routes to Schools, Park & Walk routes, pedestrian training. Cycling initiatives - cycle maintenance, cycle accessories, cycle training. Car sharing - join 'shareajourney' database. Promote existing private bus service and trial new bus route. Strengthen partnership with County Council. Develop teaching resources. Consider improving highway/bus stop/pavements around school.	Walking has increased by 15-20%.
School	TP integrated with all aspects of school policy. Walking initiatives - Walking on Wednesdays, Safe Routes to Schools, Park & Walk routes, pedestrian training. Car sharing - join 'shareajourney' database. Promote existing private bus service and trial new bus route. Classroom activities - 'dipstick' surveys and develop teaching resources. Improve highway - footpaths, bus stop and school entrance. Strengthen partnership with County Council.	Walking on Wednesdays - many pupils live within walking distance.
School	Incorporate TP into all aspects of school policy. Produce 3 TP newsletters per year. Encourage walking through Map IT and Walking on Wednesdays. Encourage cycling through improved facilities, cycle maintenance and training. Promote car sharing (Shareajourney). Provide info on local bus services. Promote and road safety issues as part of curriculum. Conduct twice yearly 'dipstick' monitoring. Improve site management of parking and bus bays.	All policy changes have been implemented. TP newsletter has been set up (though unlikely to continue indefinitely). Some site improvements (Zebra Xing installed - more improvements to follow (bus bays etc)). Car sharing taken up through informally rather than through Shareajourney scheme.
Other Private	Increase appeal of public transport by discounts, personal TPs etc. Possibility of pool cars. Incentives for parking at Park & Ride. Incentives for car sharing. Participation of People Development Group in TP process	Participation in a scheme supported by city & county councils, which enable firms to identify realistic travel alternatives to car travel.
Company	Car sharing database - free priority parking and guaranteed ride home. Video conferencing. Partnership with Council to improve town centre security, cycle routes and bus services. Partnership with bus operators to improve scheduled services and offer reduced fares. Shuttle bus between sites. Improve company cycle facilities. Provide company cycles and motorcycles. Introduce flexible employment.	Car share database set up (40-50 single occupancy cars reduced to date). Partnerships established. Some video conferencing starting to be used. Instigating shuttle bus. Improved company cycle facilities. 10% reduction on bus season tickets for staff.
School	School management measures. Engineering measures. Promotion of cycling and walking.	A pelican crossing and a health newsletter. Further engineering measures are possible, plus cycling storage.
School	Report not available	Walking bus. Parking within school grounds. Start pedestrian and cycle training in Spring.
Local Auth.	Publicise findings of pilot study within partners & other travel co-ordinators within other GM authorities. Apply for more funding from DfT. Continue joint working & communication. Continue the work of the forum.	Transport operator 'First' is considering employees transport.
Hospital	Need for permanent TP coordinator, travel surveys, consultation. Public transport service improvements, quality partnerships. Rail use by staff where appropriate. Introduce staff car parking changes. Improve freight logistics. Improve cycling access & facilities, set up cycle users group. Support existing car sharing scheme. Promote walking (personal alarms, clothing, and umbrella pool. Promote video conferencing & teleworking where appropriate.	Set up cycle user group. Conducted full transport assessment and further consultation.
Local Auth.	Action Plan. Business Plan. Communications and marketing strategy	All three areas are being put into place. Used communication and marketing strategy - very useful.
TOTAL	All Measures Recommended = 164	Implemented = 53
	Infrastructure Measures Recommended = 31	Implemented = 14
	Organisational Measures Recommended = 133	Implemented = 39