



This item was submitted to Loughborough's Institutional Repository by the author and is made available under the following Creative Commons Licence conditions.

A yellow rectangular box containing the Creative Commons Attribution-NonCommercial-NoDerivs 2.5 license summary. At the top is the Creative Commons logo (CC) and the text 'creative commons' in a bold, lowercase sans-serif font, with 'COMMONS DEED' in a smaller, spaced-out font below it. The license title 'Attribution-NonCommercial-NoDerivs 2.5' is centered. Below this, the text 'You are free:' is followed by a bullet point: 'to copy, distribute, display, and perform the work'. Then, 'Under the following conditions:' is followed by three icons in circles: 'BY' (a person), 'NC' (a dollar sign with a slash), and 'ND' (an equals sign). Each icon is followed by a bolded title and a description. At the bottom, there are two bullet points, a statement about fair use, and a link to the legal code with a document icon.

For the full text of this licence, please go to:
<http://creativecommons.org/licenses/by-nc-nd/2.5/>

Evaluation of school and workplace travel plan SSA programme

Contents

Front cover	2
1. Executive Summary	3
2. Introduction	7
3. Research Method	8
4. Data Sources	11
5. Interim Results of Evaluation Study	13
5.1 Analysis of Feedback Forms	13
5.2 Context of receiving advice	18
5.3 Scope and quality of the advice	21
5.4 Impact of the advice	26
5.5 Management of the SSA	30
6. Overall value for money of the scheme	33
6.1 Mapping the effect of SSA.....	33
6.2 Estimating the Transport Benefit	37
6.3 SSA cost in cutting vehicle trips and CO2 emissions	37
7. Conclusions and Recommendations	39
7.1 Main Conclusions	39
7.2 How the SSA scheme might be improved	39
8. Completing the Research	41

Front cover

Evaluation of School and Workplace Travel Plan SSA Programme - Interim Report

Dr Stephen Potter (Project Manager, The Open University)

Dr Ben Lane (The Open University)

Dr Graham Parkhurst (University of the West of England)

Dr Sally Cairns (University College London)

Dr Marcus Enoch (Loughborough University)

Department for Transport
July 2003

1. Executive Summary

In 2002, the Department for Transport (DfT) commissioned the Open University (in collaboration with University College London, University of West of England and Loughborough University) to evaluate the Travel Plan Site Specific Advice (SSA) programme, and to advise on the most appropriate way of providing Travel Plan advice and support in the future. The key objectives set for the evaluation were to assess the scope and quality of the advice given, the impact of the advice offered, the management of the scheme, how the scheme might be improved and the overall value for money of the scheme.

To date, around 400 clients have been offered advice through the programme. The evaluation study aims to examine in detail 30-40 cases of organisations receiving advice, selected to be broadly representative of the SSA programme as a whole, including school and workplace clients. The evaluation study has been conducted through the analysis of existing SSA documentation (including the Pre Visit Questionnaire (PVQ), Interim and Final Reports and Feedback Form), structured interviews with each client and with the relevant advisor.

The study team has completed interviews with 26 client organisations, the documentation analysis for 24 cases and interviews with 7 advisors (representing 12 cases). An interview has also taken place with the SSA manager at AEA Technology. As the project progresses, further interview and documentation data will be collated and analysed. The interim results of the study to date are as follows.

Interim Results of SSA Evaluation

On applying to the SSA programme, almost half of the clients had not developed a strategic Travel Plan. Of those that had, the plan was at an early stage. Around half of clients requesting SSA were implementing Travel Plans on a voluntary basis, with around a half doing so because of planning requirements. The most common ways of hearing about the SSA were via the local authority and via specific publicity about the scheme, and only a small number had used reference materials such as the Travel Plan resource pack or the telephone helpline provided by AEAT. Nearly three-quarters applied for advice as soon as they heard about the programme indicating that SSA is perceived as an attractive service to potential clients.

Take-up varies strongly by region, possibly suggesting variations between councils that promote Travel Plans and the SSA and those that do not. From the parallel research on the LA Bursary scheme,¹ it was noted that only 30% of bursary holders appear to recommend the SSA to potential clients. It is noticeable that take-up of SSA has been greater amongst large organisations; among non-school cases, the average number of employees per client is 2,500.

On average, the time over which SSA was delivered was 7 months, typically with three site visits being combined with telephone and email follow-up from the advisor. In most cases, 5 days of SSA was delivered, although there were some larger organisations that received more time. Most clients and advisors were satisfied with the time available and provided anecdotal evidence that clients had actually received more than the official allocation. However, most clients and advisors indicated that they would have benefited from a relatively modest increase in the time available to assist with implementation. Some advisors also thought that their time would have been better used in increasing the involvement of stakeholders in the Travel Plan network.

¹ In 2001, the Department for Transport provided funding for 111 bursaries for Travel Plan co-ordinators, available to 84 local authorities across England for a 3-year period until March 2004. This scheme is currently under evaluation (Evaluation of the Programme of Bursaries for Local Authority Travel Plan Co-ordinators - Interim Report, April 2003 - prepared for Department for Transport).

Analysis of the documentation suggests that clients were generally uncertain about what the SSA could provide, and what they would need in order to progress their Travel Plan. This is backed up by responses from the interviews which shows that around a third of clients were conscious that they had not really known what to expect from the scheme. Over three-quarters of clients had wanted the advisor to lead the Travel Plan process, rather than just assist with the development of certain measures. This suggests that a key role for the advisor is to perform a 'mentoring' role, to help the client to articulate needs and providing strategic assistance.

The three most common tasks undertaken by the advisors were: travel surveys; liaison with external organisations; and general mentoring. This mix of activities reinforces the earlier findings that the organisations' Travel Plans were often at an early stage, and that the advisory role tended to be strategic rather than focused on specific issues. These results highlight that a major component of many SSA projects is the learning process through which the client discovers how the SSA can best be used. It is, therefore, an important part of the advisor's role to manage this process.

There was a very positive response of recipients of site-specific advice. In general, around 80% of clients were either 'satisfied' or 'very satisfied' with both the appropriateness of the recommendations they received, and the SSA programme as a whole. When asked what were the most beneficial aspects of the scheme, client mentioned the following: the fact that advice was free, having an advisor who was time-dedicated, could lead Travel Plan process and was an independent source of information who could liaise with network including senior management, and that advisors would provide strategic advice and support specific tasks. However, there was less satisfaction with support from other organisations. For example, clients and advisors reported a wide range of views regarding the help that local authorities and transport operators were able to provide.

In terms of the impact of the SSA programme, it is clear that it is having a number of beneficial effects. In particular, both clients and advisors feel that SSA is resulting in better Travel Plans, with new or faster Travel Plan development resulting directly from the advice. There is strong evidence that client knowledge and understanding of the Travel Plan process has increased due to involvement in the SSA programme. The SSA also seems to have been effective in strengthening the commitment to the Travel Plan process at a number of levels including an increase in staff time and money committed to the Travel Plan process. Also analysis of client perceptions suggests that senior managerial commitment to the Travel Plan has improved as a result of SSA.

Analysis of the Travel Plans developed through the programme show that the three main objectives of clients' Travel Plans were to reduce traffic, address parking constraints and improve alternative travel options. In contrast, less than 30% said that the Travel Plan was intended to improve the attractiveness of the organisation to staff (or students) and only 12% were using the Travel Plan to help meet the requirements of general environmental standards sought by the organisation. This suggests a degree of isolation of s from other organisational functions.

The study also analysed the effect of the SSA programme on the level of successful implementation of Travel Plan measures. Over half of clients said that there were travel planning developments or changes that had *only* taken place as a result of SSA, while almost two-thirds reported that developments or changes had taken place *more quickly* as a result of the programme. An initial survey shows that, around a third of infrastructure and organisational measures recommended have been successfully implemented to some degree. Whilst the overall picture seems broadly positive, it is also clear that nearly all clients examined to date were unable to implement at least one of the measures recommended by their advisor. The main reasons given by clients were usually some sort of stakeholder opposition or a lack of resources.

Clients and advisors were largely positive about the overall management for the programme. However, regarding the application process, clients indicated that it was difficult to provide some of the requested information for the PVQ prior to receiving advice. In its defence, the application procedure (including paperwork) is likely to be filtering out less committed potential clients. Nearly all advisors offered possible suggestions as to how the current programme might be improved. These

included a streamlining of the payment procedure, more information and/or training, a more stringent client selection process and the need to strengthen regional Travel Plan networks (see below).

Value for money of the scheme

A method has been devised to make an approximate calculation of the value for money provided by the programme. The method is based on previous work for the DfT on the effectiveness of Travel Plans, which indicates that up to a 20% reduction in vehicle trips can be achieved. The calculation uses information from the interviews to make estimates of the type of Travel Plan that was *envisaged* before and after the SSA intervention, and is based on the average SSA cost of £2,560 per site delivered over an average duration of 5.1 days. Two quantitative measures are produced; the cost per vehicle trip reduced and the cost per tonne of CO₂ reduced.

A preliminary mapping of 11 workplace clients suggests that the effect of the SSA has been to produce improvements to the Travel Plans resulting in an average of 2% cut in vehicle use. If the benefits of the SSA programme are assumed to have a lifetime of one year, the cost per vehicle trip cut is estimated to be £85 and the cost per tonne of CO₂ cut is £66. If a more reasonable assumption is taken that the SSA effect would last for a total of three years, then the cost per vehicle trip cut is £28 and the cost per tonne of CO₂ cut is £22.

Even using pessimistic assumptions taken for the SSA programme, in terms of value for money for investment by the Department for Transport, initial estimates suggest that the SSA programme is more cost effective than some other policy initiatives in terms of reducing CO₂ emissions and effecting modal shift. However, it should be emphasised that the methodology is still under development. A parallel categorisation would need to be developed for schools, but as appropriate information on school Travel Plans is less readily available a different method may need to be adopted.

Improvements to the scheme

Although the SSA programme can be regarded as a success overall, there is clearly room for improvement in some areas. For example, it is clear that the SSA projects are not always well-linked with all the other forms of Travel Plan advice available. Clients do not seek SSA via all possible routes and many are unaware of other advice sources. Advisors were generally of the opinion that the programme could be better linked with current web and telephone Travel Plan dissemination (such as the TransportEnergy Best Practice Programme² telephone helpline).

Regarding programme management, many advisors noted the need for more information and/or training and a more stringent client selection process. Several also suggested a streamlining of the payment procedure to account the fact that a relatively small number of days work are delivered over many months.

Some advisors highlighted a need to strengthen regional Travel Plan networks. This would both enable organisations to learn from each other's experience, and might also give prospective SSA recipients a better grounding in general Travel Plan issues, so that they could then be more specific about what they wanted from SSA. However, in practice, it may be that 'getting started' is the hardest part of the Travel Plan process, and that one reason why SSA is valuable is precisely because it provides a catalyst for this part of the process. Furthermore, the precise roles of local authorities and their links with the SSA programme also remain unclear. This is particularly the case where Travel Plan bursary posts are in place and further research is needed to ensure that there is synergy and support rather than replication or antagonism between the two schemes.

At this stage of the appraisal project, and to address issues raised by the evaluation, a number of initial recommendations about how the SSA scheme might be modified have been proposed. These include:

² Formerly the Energy Efficiency Best Practice Programme.

- **Gaining senior management support:** One possibility would be to make providing an opportunity to discuss with senior management a key requirement for organisations that seek SSA.
- **Improved reporting:** Requiring reports to provide a more detailed work plan (in terms of who is responsible for doing what, and by when) might help to bridge the gap between Travel Plan strategies and implementation.
- **Travel plan stage:** Some advisors feel that advice at the early stage could be provided by other methods. For example, the relevant local authority could deal with some technical issues, such as the appropriate application of survey techniques.
- **Advisor requirements:** advisors would like better financial procedures for the scheme, and more training. Clients' views of advisors suggest that knowledge of local context, and knowledge of the organisations in which they work are two areas where advisors' skills could be improved.
- **Time available:** To provide a modest increase in the time per client would without this leading to too much dependence on government subsidy. One way to avoid such a problem might be to make a follow-on 5 days available at half cost. This would thus require a commitment from the client organisation while still providing a positive incentive.
- **Integrating with other sources of advice:** It could be useful for Advisors to concentrate on two or three geographic regions, and their contract of appointment include spending at least half a day meeting with the respective LA teams on a six monthly basis to establish the working relationships. This is an approach that has been used effectively in Leicester, Northamptonshire and Oxfordshire.
- **Satisfaction/dissatisfaction:** overall, levels of satisfaction with the SSA are very high. A key issue is to understand why this is not the case in a small minority of organisations.

2. Introduction

In the four years since the Transport White Paper was published, the Department for Transport has promoted a range of travel awareness initiatives to encourage modal shift away from single occupancy car journeys. This is intended to cut congestion, reduce the local and global environmental effects of car travel and, for travel to school especially, to improve levels of health. In this context, the Department has encouraged the voluntary take-up of Travel Plans. Following two pilot studies, in April 2001 a programme of Travel Plan Site Specific Advice (SSA) became available to businesses, schools, hospitals, local authorities and other major employers in England. This is part of the Government's TransportEnergy Best Practice Programme (formerly the Energy Efficiency Best Practice Programme), and provides up to five days of free advice from a panel of 35 external consultants.³ The programme is managed by the consultancy AEA Technology (AEAT) with a budget of £0.5m a year for three years to March 2004.

In November 2002, the DfT commissioned the Open University (in collaboration with UCL, UWE and Loughborough University) to evaluate the SSA programme, and to advise on the most appropriate way of providing Travel Plan advice and support in the future, based mainly on national experience, but also informed by international experience.

The key objectives set for this study are to assess:

1. The scope and quality of the advice given, including recipients' perceptions of the usefulness of the advice.
2. The impact of the advice offered in terms of practical solutions and evidence of changes in travel behaviour that might otherwise not have occurred.
3. The management of the scheme, including the extent to which any recommendations for change made in the evaluation of the pilot schemes have been met.
4. How the scheme might be improved.
5. Overall value for money of the scheme.

To receive advice client organisations contact AEAT and are sent a **Pre Visit Questionnaire (PVQ)** to complete (*see Appendix 1*). Having returned this form, and been deemed eligible, the organisation is allocated an advisor who is selected from a panel of experts in the preparation of Travel Plans (*see Appendix 2 for the current advisor contract specification*). The advisor makes contact with the client, visits the site, and produces an **Interim Report**, outlining the nature of the issues to be addressed. The advisor and client then decide on the best use of the remaining time. On finishing the assignment, the advisor produces a **Final Report** (the structure of which is stipulated by AEAT) for the client. The client is also requested to return a one-page **Feedback Form** to AEAT evaluating of the advice received. As of April 2003, around 400 clients had been offered advice through the programme.

³ For more information about the scheme, contact can be made through the following website:
<http://www.transportenergy.org.uk/>

3. Research Method

The research work being undertaken aims to examine in detail 30-40 cases of organisations receiving advice, selected to be broadly representative of the SSA programme as a whole. The criteria used to select cases include:

- The type of organisation (to ensure a 50:50 school:workplace split)
- The region in which the project has taken place (to ensure that all areas of the country are covered)
- A range of types of site area (to ensure consideration of cases in city centres, urban and rural locations)
- The SSA advisor involved (to ensure that as many advisors are included in the study as possible)
- Completion of the SSA project (as those at the beginning of the process were expected to be less able to comment on it)
- Cases where there are special reasons for inclusion (because of the innovative way in which the SSA is being used)

Examination of each case includes:

- Analysis of existing SSA documentation (including the PVQ, Interim and Final Reports and Feedback Form, where available)
- A structured interview with each client
- A structured interview with the relevant advisor (advisors are asked both about the case study(s) in which they are involved, and general issues related to the SSA programme.)

The first stage of analysis was an assessment of the Feedback Forms available. The forms considered a number of topics that a series of interviews sought to explore in more depth. '**Interview Discussion Guides**' were developed to structure the interviews and the analyses of the documentation. Questions in the Guides are either open response, yes/no or interviewees are asked to rate statements on a five-point scale (where 1 is negative and 5 is positive). Many of their assessments are shown in the charts reported later in this paper.

At this stage of the evaluation, 28 Feedback Forms have been analysed, covering 11 schools and 17 other organisations. The study team has also completed interviews with 26 client organisations, the documentation analysis for 24 cases and interviews with 7 advisors (representing 12 cases). An interview has also taken place with the SSA manager at AEAT. Half of the client and nearly three-quarters of the advisor interviews have been conducted face-to-face, whilst the remainder have been completed by telephone. As the project progresses, further interview and documentation data will be collated and analysed.

SSA Project Selection

The research project required the eventual completion of 30 - 40 cases, selected so as to be broadly representative of the SSA programme as a whole. The criteria used to derive a group of cases considered:

1. The type of organisation
2. The region in which the project took place
3. The need to represent a range of types of site area (*i.e.*, city centre, urban or rural)

Evaluation of school and workplace travel plan SSA programme

4. The need to include a large proportion of SSA consultants (who varied somewhat in the number of clients they had served).

Initially, a total of 60 projects were selected in order to allow for some dropouts as interviewing progressed. Of the 378 SSA projects when the research began, 49% of organisations in the database were schools and 51% workplaces. Hence, 31 of the selected cases were workplaces and 29 schools. These were then subdivided using the database classifications. Within the group of school SSA projects, an analysis of the full database showed 68% to be primary schools and 32% secondary schools. Thus, 19 primary and 10 secondary schools were selected.

For the workplace SSAs, the database provided six categories, which were NHS sites (27% of projects), Local Authorities (19%), Leisure and Retail (9%), Other Private (29%), Other Public Sector (6%) and Further Education (10%). This meant that the total of 31 workplace SSA projects would involve 8 NHS sites, 6 Local Authorities, 3 Leisure and Retail sites, 9 Other Private, 2 Other Public Sector and 3 Further Education sites.

Having selected the spread of SSA project according to organisation type, these were then split by region. From the database, the regional distribution of School and Workplace SSA projects was calculated. For schools, 4% were in London, 21% in the South East, 16% in the North-East, 3% in the West Midlands, 32% in the South West, 6% in the East Midlands, 15% in Yorkshire/ Humberside, 1% in the Eastern Region and 2% in the North East. The strong concentration of projects in the South West and South East is notable. (This concentration will be investigated in the next phase of the evaluation study - see Section 8.)

Workplace SSAs had a wider spread, although as with schools, very few (only 4%) were in London. 22% were in the South East, 14% in the North-East, 13% in the West Midlands, 12% in the South West, 11% in the East Midlands, 10% in Yorkshire/Humberside, 9% in the Eastern Region and 5% in the North East. Table 3.1 shows the required distribution of the 60 case study projects by organisation type and region, in order to reflect the proportions found in the database as a whole.

Table 3.1 Project Selection by Organisation Type and Region.

Schools, 49% = 29				Workplaces, 51% = 31						
	%	Primary (68%) = 19	Secondary (32%) = 10	%	NHS Sites (27%) = 8	LA (19%) = 6	Leisure /Retail (9%) = 3	Other Private (29%) = 9	Other Public Sector (6%) = 2	Further Ed. (10%) = 3
London	4	1	0	4	1	0	0	0	0	0
Sth East	21	4	2	22	2	0	1	2	1	1
Nth West	16	3	2	14	1	2	0	1	0	0
West Mid	3	1	0	13	1	1	1	1	0	0
Sth West	32	6	3	12	1	0	1	1	0	1
East Mid	6	1	1	11	1	1	0	1	0	0

Evaluation of school and workplace travel plan SSA programme

Yks/ Hum	15	3	2	10	1	0	0	1	0	0
Eastern	1	0	0	9	0	1	0	1	1	0
Nth East	2	0	0	5	0	1	0	1	0	0

Actual selection closely followed Table 3.1. Projects were randomly chosen within the distribution requirements, although with some adjustments, as certain workplace project types did not feature in some regions. A check was then made of the selected projects for the Advisors involved. Of the 34 Advisors, 26 were involved in the selected projects, and the level of involvement in these case studies were approximately in proportion to the consultants' overall SSA workloads. The selection was therefore viewed as appropriately representative for consultant participation. The Pre-visit Questionnaires (PVQs) of the projects were used to classify city centre, urban and rural projects.

In order for this study to obtain complete data sets from case studies, it was necessary that as many of the selected projects as possible should have been near completion or finished. Only 87 projects in the whole database were completed when the research started (*i.e.* as of 31st October 2002, although 96 had been completed by 28th February 2003). Just over half (31) of the projects chosen for this study were completed and this group was prioritised for interviewing. It was not possible to raise this proportion further without producing an imbalance in the regional spread or project type. As interviews progressed it was necessary to substitute some cases. This was largely because the original contact person had left and nobody had sufficient knowledge of the SSA project. The drop out rate was relatively low and, to date, only four cases have been substituted.

In discussing the selected projects it was agreed to examine the cluster of school Travel Plan projects in Cornwall and also to include two 'premature completion' (*i.e.* abandoned) projects (see section 5.2.2). These issues will be investigated in the next phase of the evaluation study (see Section 8).

4. Data Sources

SSA Documentation

The four main documents related to each SSA case are:

1. Pre-Visit Questionnaire (PVQ)
2. Interim Report
3. Final Report
4. Feedback Form

The research team obtained from AEAT and the Department for Transport all the documents that related to the selected cases where available. Document analysis occurred as part of the data collection process, the results of which are reported later in this report. The main documentary analysis was conducted using a document analysis guide (*see Appendix 5*), which was used to structure the assessment of the PVQ, Interim and Final Reports. A separate and detailed assessment was also made of all the Feedback Forms. It should be noted that Feedback Forms were not available for all selected cases analysed as part of this SSA evaluation. In total, the number of Feedback Forms represents about 30% of the completed SSA projects.

At the beginning of the evaluation project, an overview analysis of a sample of the Final Reports took place. This informed the full document analysis and the design of the interview discussion guides. This analysis showed that the reports vary greatly. One source of variation is to be expected, in that the reports need to be tailored to the needs of the individual sites. Furthermore, in some cases the clients were well advanced with their Travel Plans and seeking detailed assistance, whereas others were at very early stages and needed more overarching advice and guidance.

However, the Advisors only rarely report their response to the brief and how they identified the priority areas for Travel Plan development. The reports also vary considerably in their length, the quality of their presentation, and evidence of interaction with the clients. Discussions with AEAT about the brief indicated that this was less precise at the start of the SSA programme and that currently reporting requirements are clear (*see Appendix 2*). However, most of the completed projects and Final Reports date back to the earlier stage in the SSA programme.

Interview Discussion Guides

Two interview discussion guides were used to structure the interviews with clients and Advisors:

- Interview discussion guide for the Client (*see Appendix 3*).
- Interview discussion guide for the Advisor (*see Appendix 4*).

The client guide formed the basis of interviews with clients, which focussed on their specific experience of receiving SSA for a particular case. The Advisor guide formed the basis of discussion with Advisors and was structured in two parts; the first was related to cases with which the Advisors had been involved, the second related to general issues related to the SSA programme (e.g. administration, etc.). The results from the interview analysis were entered into a database and analysed and are reported in the sections which follow.

Access Database

As the project team collected data, it was input into an Access database that was structured in the same way as the discussion and documentation analysis guides. The analysis was conducted either using tools available within Access or by exporting the data to an Excel spreadsheet and conducting statistical counts and text analysis within the spreadsheet environment.

Evaluation of school and workplace travel plan SSA programme

This Interim Report contains the results that have, to date, been input into the database. As the SSA evaluation project progresses, further interview and documentation data will continue to be entered into the database for further analysis.

5. Interim Results of Evaluation Study

5.1 Analysis of Feedback Forms

This section describes the findings that are a result of analysis of the Feedback forms completed by clients and returned to AEAT. These findings were used to initiate the evaluation study, the main results of which are discussed in Sections 5.2-5.5.

The Feedback forms permit a simple and effective evaluation of the SSA projects at completion. The opportunity has therefore been taken to complete a full analysis of the information they contain. Copies of all the available Feedback forms on the SSA projects were obtained from AEAT. This involved 28 Feedback forms from 11 schools and 17 other organisations. This represents about 30% of the completed SSA projects. The following is an analysis of the eight questions asked.

1. Where did you hear about Site Specific Advice?

The responses were as shown in Table 5.1 (some cited more than one source)

Table 5.1 How client heard about SSA

	All	School	Other
Mail Shot	6	3	3
Council	4	2	2
ETSU/EEBPP/AEAT	3	1	2
Web	3	0	3
Sustrans	2	2	0
Travel Plan Resource Pack	2	0	2
Local Education Authority	1	1	0
A 'Seminar'	1	0	1
Better Ways to School	1	1	0
Greater Manchester Hearts and Minds Group	1	0	1
Road Safety Officer	1	1	0
No answer	4	1	3

The sources of initial information about the SSA were diverse. Mail shots and via the local council were the main two. A local authority Travel Co-ordinator was mentioned once, although Travel Co-ordinators may have been involved in the other four instances when the client heard about the SSA through the council. Contacts via the AEAT organisation (mailshots, the Resource Pack and the AEAT seminars) were also important, but there was no mention of use of the programme's telephone helpline (*see Appendix 2*).

2. What were your main objectives in applying for SSA?

Some responses were in terms of the problems they faced, while others saw their objectives in terms of the stage they were at in developing a Travel Plan. Many appeared to be at an early stage of a Travel Plan, seeking advice on how to set one up. This particularly applied to Schools.

Table 5.2 Main objectives in applying for SSA

	All	School	Other
To start a Travel Plan	17	9	8
To develop/complete/promote existing Travel Plan	5	0	5
To review/audit existing Travel Plan	2	0	2
To implement a Travel Plan	1	1	0
To help with specific Travel Plan Measures	3	3	0

In terms of problems faced, congestion and parking problems were the main drivers. Only one specifically mentioned the need to meet a planning condition.

Table 5.3 Problems addressed in applying for SSA

	All	School	Other
Congestion/Parking problems	7	4	3
Promote walking/bike/bus	5	4	1
Road safety	2	2	0
Children's fitness	1	1	0
Poor transport links to site	1	0	1
Planning permission needed	1	0	1

3 & 4. How useful were the consultant's visits and reports?

There were a variety of responses to this question, so for both questions 4 and 5, the responses were categorised using the same 5-point scale as was used in the main survey discussion guides. This was a 5-point scale with 1 representing 'of no use' and 5 'excellent'. This can be compared with question 6 where the client was asked to provide an overall satisfaction score.

In general there was a very high level of satisfaction in answer to both these questions, with 89% finding the consultant's visits very useful or excellent (and most in the top category) and 89% viewing the consultant's reports as very useful or excellent (again most in the top category)

Table 5.4 Satisfaction with Consultant's visits and reports

Evaluation of school and workplace travel plan SSA programme

	Q3. Consultant's visits			Q4. Consultant's reports		
	All	School	Other	All	School	Other
1 of no use	1	0	1	2	0	2
2 of some use	1	0	1	0	0	0
3 moderately useful	1	0	1	1	0	1
4 very useful	7	1	6	8	2	6
5 excellent	17	9	8	17	9	8

Examples of views on the consultant's visits included:

The visits "were vital in both collecting opinions and attitudes and developing the issues paper on which to base the Travel Plan" and "got our school Travel Plan established and off the ground".

On the consultant's reports, comments included:

The reports were "direct and easy to understand", "helped us clarify our objectives", "helped mobilise opinion" and were "good in negotiations and gaining finance".

However, there were two who felt there was little value in both the visits and reports. One said of the visits and report that they were "not useful other than confirming what we already know - everything seems to relate to inner city transport links" and "very limited use"

The single middle-scoring respondent said that the visits were "quite useful, but could have been in more depth" and the reports were "useful, but hoped for more information".

One of the high-scoring respondents did note that "writing the Plan is the easy bit. Difficulty is in implementation".

It is interesting to note that the positive responses largely refer to how the SSA project had helped strategic issues such as building up consensus for a Travel Plan, winning finance and building a relationship with the local authority. The SSA is, therefore, addressing these key higher order objectives, which are crucial to the long-term success of a Travel Plan.

5. Has the service helped you to take action and develop/implement a Travel Plan?

26 respondents (93%) replied 'yes' and only 2 (7%) 'no'. The comments were analysed to identify in what way the SSA had helped the clients to take action to develop or implement a Travel Plan. These are shown in Table 5.5. Again, it is notable that these relate largely to strategic issues, such as winning funding, links to local authorities and building up acceptance and support for a Travel Plan. Only a few comments related to technical issues, such as providing information. This indicates the strategic use and benefits of the SSA programme.

Table 5.5 How the SSA helped client Travel Plans

	All	School	Other
Generally advanced Travel Plan development	10	5	5
Motivated and developed support for the Travel Plan	4	2	2

Evaluation of school and workplace travel plan SSA programme

Highlighted obstacles	1	0	1
Provided information	1	1	0
Helped secure funds for a Travel Plan	2	2	0
Provided reassurance/confidence	3	2	1
Travel Plan won local authority approval	4	0	4
Led to use of specific measures	2	2	0
Strengthened case for assistance from Local Auth.	1	0	1

Specific comments included:

The SSA "helped to get things moving on a project for which no budget was (previously) assigned", "provided stats and data for decision makers", "useful for getting staff involved" and "helped draw up action plan". "A great help. Our plan has now been drawn up and money awarded".

The few negative comments included:

"Specific advice asked for not actually given. Slow in giving advice"

However, there were qualifications to some positive comments. These largely reflected the fact that many of the Travel Plans were at the development rather than implementation stage, which some felt would raise problems. Some also had not secured funding for the implementation of their Travel Plan.

Evidence from the feedback suggest that, overall, the SSA is having an overwhelmingly positive impact and the 'leverage' effect in making the case for funding and management support seems particularly of note.

6. Overall satisfaction with the service received

The respondent was asked to provide a rating out of ten to reflect their overall satisfaction. Both schools and employers averaged a score of 8 out of 10, although there was a wider distribution on scores for employers and the schools seemed reluctant to award maximum marks.

Table 5.6 Scoring of overall satisfaction with the SSA

Score	10	9	8	7	6	5	4	3	2	1	Average
Schools		6	4							1	8
Employers	5	3	4	3	1			1			8

7. Other comments on the visits and reports

Only about half the respondents provided further comments (Table 5.7)

Table 5.7 Other comments on the SSA project

	All	School	Other
Would have liked longer period of advice	3	1	2

Evaluation of school and workplace travel plan SSA programme

Plans to employ consultant further	1	0	1
The good quality of consultant's work/interaction with client	4	2	2
Would like further support of some kind to take Travel Plan forward	2	1	1
Financial difficulties in Travel Plan implementation	2	0	2
Time only allowed for basic work to be done	1	0	1
Concerned about consultant's experience	1	0	1
Needed senior management engagement	1	1	0

Comments included:

"The consultant was good value and worked well with pupils and adults".

"We were given a very generous 8 days advice".

"It was a shame there were not more funds to develop the Travel Plan and initiatives further".

"Once the SSA had finished we felt very much on our own again with no one to consult concerning the Travel Plan and any problems. There is no Travel Plan Co-ordinator in our local council".

"We would welcome some additional time!"

It is notable that, having had the Advisor's input, a number of clients felt the lack of Advisory support. There seemed to be no awareness of the TransportEnergy telephone helpline or other support organisations.

8. Summary Comments

The final question asked that, if the SSA had been of use, what 'soundbite summary' they would use to promote it. This produced responses that focused on what it was felt the SSA really delivered. Six responses emphasised the isolation and inexperience many organisations feel when starting a Travel Plan, for example:

"It's easier than trying to invent the wheel on your own"

Five chose to focus on key processes involved, for example:

"Very useful particularly when discussing the issues with local councils"

"Expert advice on engaging with staff"

"Got the concerns further up the agenda"

"Helped prepare the necessary paperwork"

Five responses concentrated on the end result, including:

"Professional help that achieved results"

"Friendly, professional service ensuring a great Travel Plan"

"The SSA gave us the Travel Plan we are now using"

Overall the Feedback forms indicated that the SSA was being used by schools and other organisations largely in the early stages of getting a Travel Plan started, the crucial process of securing and justifying resources for it and developing appropriate measures for a site. With very few exceptions, there was a high level of satisfaction of the service received from the Advisors, who were concentrating upon the key strategic processes such as developing understanding and support for the Travel Plan. However some felt that implementation would be difficult and would have appreciated further advice and assistance (see Section 5.3.2).

The remainder of Section 5 describes the interim findings that are a result of analysis of the original data gathering and analysis for this project. The data sources were:

- **SSA documentation (PVQ, Interim and Final Reports, where available).**
- **Structured interview with clients.**
- **Structured interview with the advisors (advisors are asked both about the case study(s) in which they are involved, and general issues related to the SSA programme).**
- **Interview with the SSA manager at AEAT.**

5.2 Context of receiving advice

5.2.1 Client motivations

"We needed guidance on how to start a Travel Plan and had no in-house experience" [Client]

Results from the structured interviews show that, prior to the SSA, over 40% of the clients sampled had not developed a strategic Travel Plan (though many had focused on specific transport measures). Of those that had a Travel Plan, the plan was at an early stage; the average time that any pre-existing plans had been in place was 18 months. Around half of clients requesting SSA were implementing Travel Plans on a voluntary basis, with around a half doing so because of planning requirements. It is noticeable that take-up of SSA has been greater amongst large organisations; among non-school cases, the average number of employees per client is 2,500. This means that the SSA has an impact on a large number of people. Travel Plans in general tend to be mainly adopted by larger organisations, so this concentration in the SSA is to be expected.

The most common ways of hearing about the SSA were via the local authority (half of clients interviewed) and via specific publicity about the scheme (just over a quarter). Take-up varies strongly by region, possibly suggesting variations between councils that promote Travel Plans and the SSA and those that do not. From the parallel research on the Local Authority (LA) Bursary scheme,⁴ it was noted that only 30% of bursary holders appear to recommend the SSA, and this issue will be explored further in later stages of our research.

Only two clients interviewed had used reference materials such as the Travel Plan resource pack and only a small number had used the telephone helpline provided by AEAT. Many organisations were unaware of the different forms of advice and support that may be already available to them. Nearly three-quarters applied for advice as soon as they heard about the programme. This indicates that SSA is an attractive concept, and that the availability of other forms of help does not negate its perceived usefulness.

In most cases, it has been difficult to ascertain the particular transport problem motivating each client to apply for SSA. This is largely due to the fact that most clients cite a large number of issues (at the PVQ stage) for which they need assistance. (This point is discussed in the next section.) However, as

⁴ In 2001, the Department for Transport provided funding for 111 bursaries for Travel Plan co-ordinators, available to 84 local authorities across England for a 3-year period until March 2004. This scheme is currently under evaluation (Evaluation of the Programme of Bursaries for Local Authority Travel Plan Co-ordinators - Interim Report, April 2003 - prepared for Department for Transport).

clients were asked to list the objectives of their Travel Plan, it is possible to analyse the main motivating factors of clients receiving advice. According to clients, the three main objectives of their Travel Plans were to reduce traffic (mentioned by 88% of cases), address parking constraints (77%) and improve alternative travel options (85%). In contrast, less than 30% said that the Travel Plan was intended to improve the attractiveness of the organisation to staff (or students) and only 12% were using the Travel Plan to help meet the requirements of general environmental standards sought by the organisation. These results indicate that links between the Travel Plan and core activities of an organisation occur in less than a third of cases. There is a degree of isolation of Travel Plans from other organisational functions.

5.2.2 Client requirements and expectations

"[We] didn't know what to expect" [Client]

"Most clients expected too much for 5 days - A Rolls for a Metro.

I needed to explain what is possible and the best use of 5 days." [Advisor]

Analysis of the PVQs shows that, on average, clients cited around seven areas in which they were hoping for SSA. Rather than take this at face value, we interpret this as reflecting clients' level of uncertainty about what the SSA could provide, and what they would need in order to progress their Travel Plan. This is backed up by responses from the client interviews: around a third of clients were conscious that they had not really known what to expect. Over three-quarters of clients had wanted the advisor to lead the Travel Plan process (rather than just assist with the development of certain measures). Hence, it seems that a key role for the advisor is to perform a 'mentoring' role, to help the client to articulate needs and providing strategic assistance.

In the cases analysed, the advisors generally shared the view that many clients did not initially have a clear idea of what they wanted from the advice programme. As a consequence, in some cases, advisors noted that client expectations of the SSA programme were highly unrealistic - at the extreme, expecting the advisor to 'do' the whole Travel Plan for them (including, in some cases, implementation).

The need for advisors to provide general guidance is reinforced by analysis of clients' responses about whether there was a trigger for seeking advice at the *particular* time that they did. As shown in Table 5.8, the three main reasons given were that: they needed help with starting a Travel Plan; that they were unclear how to progress an existing Travel Plan; or that they were starting or finishing a travel survey. It is of note that the response 'problems with senior management commitment' was mentioned exclusively by non-school clients.

Table 5.8 Reasons for seeking SSA at the time when they did so

	All	School	Other
No reason - just discovered SSA was available	1 (4%)	1	0
Travel survey starting or finishing	5 (19%)	2	3
Meeting or focus group due	3 (12%)	1	2
Problems with senior management commitment	3 (12%)	0	3
Needed help with starting Travel Plan	12 (46%)	6	6
Unclear how to progress existing Travel Plan	6 (23%)	2	4
Other	14 (54%)	5	9

The reasons behind the uncompleted (premature completion) projects appeared to be about client expectations. One of the two examined, which are not included in Table 5.8, was a school having trouble recruiting someone for a crossing patrol. SSA was not really relevant to them. The other, an employer, seems to have applied to for SSA in anticipation that they would need to do more to fulfil a planning requirement, but in practice satisfied the local authority on their own.

5.2.3 External Support

"Some individuals [at the Local Authority] are good, but very frustrating as a whole, particularly in terms of implementing engineering measures." [Client]

As mentioned above, over three-quarters of clients reported that they had obtained some sort of assistance with specific travel *measures* before receiving SSA. Support was sought mainly from the local authority, although a number had also contacted local public transport operators (see below). According to the advisors interviewed, local authorities were involved in all but one of the cases analysed. In over a third of cases, the advisor was responsible for involving the council in the process. Predominantly, the main point of contact in the local authority was a Travel Awareness coordinator, but Safety Officer and Highways Departments were also reported. Where councils were involved, over 80% provided 'general support' and over a third 'provision of off-site infrastructure such as bus or cycle lanes'. Less than a fifth 'promoted contact with other organisations in the local area' and less than 10% provided 'help with surveys'. In the case where there was no LA involvement, this was due to the absence of appropriate staff and sufficient resources.

Given the obvious importance of local authorities in many aspects of transport planning, it is interesting to note that clients and advisors reported a wide range of views regarding the help that local authorities were able to provide. Using the 1 (low) to 5 (high) scale, Figure 5.1 shows how clients and advisors rated the 'helpfulness' of their local authority in developing their Travel Plan. The large proportion of low scores (by both clients and advisors) is perhaps surprising given the central role played by local authorities in many cases, and is somewhat at odds with initial results from the LA Travel Plan Bursary Evaluation project (which is being conducted in parallel with this evaluation). (Although, interim results from the bursary evaluation show that around 14% of bursary clients used SSA, the SSA study has yet to ascertain what proportion of SSA clients were supported by local authority bursary post holders - this will be addressed in the next phase of the research.) Although the numbers are statistically small, the data also suggests that school clients rated LA 'helpfulness' (mode=3.5) slightly lower than did non-school clients (mode=4.0). No schools awarded a 5 in response to this question.

When questioned about the role of the local authority, almost half of advisors thought that the LA involvement could have been enhanced in some way. This was most often by being involved at an earlier stage or being more actively involved. However, the advisors were aware that many local authorities were limited by lack of staff or general resources.

Figure 5.1

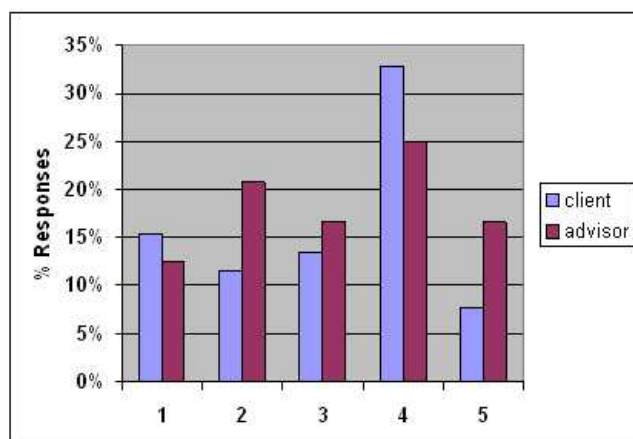


Figure 5.1 The helpfulness of the local authority in developing client's Travel Plan

In contrast to the LA Bursary evaluation project, many of the LAs covered in this study do not have bursary post holders to co-ordinate Travel Plans in their region. Therefore, it could be argued that the results shown in Figure 5.1 more closely represent the national situation. It should be noted, however, in some cases, clients were often unaware of the true level of support of their local authority as this was mediated through the advisor. For these reasons, and because of the importance of local authorities in the development of Travel Plans, this issue will be investigated in more detail in this research project (see Section 8).

The involvement of other organisations was also investigated. As with views about the role of local authorities, there was a very mixed response. Using the 1 (low) to 5 (high) scale, almost half of clients rated the 'willingness' of transport operators to be involved in Travel Plan development as only 1 or 2. A typical negative client response was the following: *The "bus arrives as children go into school, and when they leave [which is] very dangerous due to congestion. Asked [transport operator] to move 10 minute earlier or later, but no."* There was a similar quantitative response regarding the opportunities for working with other organisations in the local area. For example, those schools that wanted to work more closely with others, were often hindered by the large distances to other schools, or were unaware of other schools that had were also developing Travel Plans. Winning support from other organisations is clearly problematic and the process of building up support networks is generally weak.

Key findings:

- Many organisations have not linked their Travel Plan to the core activities of the organisation.
- Many organisations seem unaware of all the different forms of help and support available to them.
- Most are at the initial stage of developing a Travel Plan - and often lack a clear idea of what help they want, or the extent of the task they face.
- Advisors need to be able to provide strategic guidance on what organisations need, not simply help with specified tasks.

5.3 Scope and quality of the advice

5.3.1 Activities undertaken

"Things went rather slowly at first. (The advisor) asked what we wanted - but we didn't know! So it was a mutual learning process"[Client]

As shown in Figure 5.2, according to the clients, the three most common tasks undertaken by the advisors were: travel surveys; liaison with external organisations; and general mentoring. This mix of

activities reinforces the earlier findings that the organisations' Travel Plans were often at an early stage, and that the advisory role tended to be strategic rather than focused on specific issues. The frequent mention of 'mentoring' highlights the importance of the advisor's role in providing *strategic* support, not simply practical expertise. In analysing responses from different client types, schools reported 'facilitation of meetings' significantly more often than did non-school clients by a factor of four (on a percentage basis) and 'negotiation with management' significantly less often (also by a factor of four).

Figure 5.2

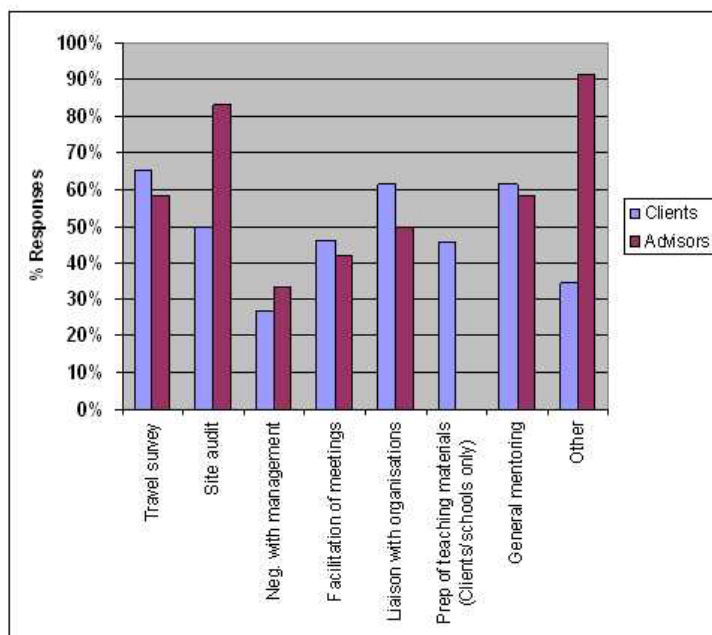


Figure 5.2 Client and advisor reports of activities undertaken by the advisor

The advisors' own perceptions of their activities were broadly consistent with the clients' views; almost 60% reported involvement in survey work with a similar percentage reporting 'general mentoring'. Around a third said they had negotiated with management, over 40% reported facilitating meetings and half had liaised with external organisations. Although there is a difference in the samples analysed, the data suggests some discrepancies between the recollections of clients and advisors. Over 80% of advisors mentioned conducting site audits, whereas only half of clients had reported advisors conducting this task. This may have been as much for advisors' own understanding of the situation as for the needs of the client. Advisors also reported many more specific tasks conducted on behalf of the client. It is interesting to note that liaison with management was only *specifically* requested by 13% in the PVQ (prior to receiving SSA). Hence, it seems that clients underestimated the need for this activity as part of Travel Plan development.

These results highlight that a major component of many SSA projects is the learning process through which the client discovers how the SSA can best be used. It is, therefore, an important part of the advisor's role to manage this process.

5.3.2 Period of the advice

"They needed more time to take things closer to implementation" [Advisor]

On average, the time over which SSA was delivered was 7 months, typically with three site visits being combined with telephone and email follow-up from the advisor. The longest-duration for a

project in the cases analysed spanned 20 months. In most cases, 5 days of SSA was delivered, although there were some larger organisations that received more time.

Most clients and advisors were satisfied with the time available (see Figures 5.3 and 5.4). In particular, of the schools responding, all rated their satisfaction at 3 or above using the 1(low) to 5(high) rating scale. In addition, many clients felt that they had actually received more than the official allocation of advisor time than had been purchased through the SSA programme. However, almost two-thirds of clients would have liked more time, often relatively modest amounts (a quarter of this sub-group wanted assistance with *implementation*). Over half of advisors also felt that more time would have been useful. However, the AEAT SSA programme manager felt that the amount of time was appropriate to focus upon key issues and that it would be inappropriate to provide more SSA time.

There is an issue here regarding the function of the SSA programme and how far SSA funding should extend. The AEAT Programme Manager sees SSA as assisting organisations to overcome particular barriers: in particular, the important issues of senior management commitment and winning funding. Furthermore, the Manager is of the opinion that the SSA programme should not function as the sole resource for organisations developing a Travel Plan.

Figures 5.3 and 5.4

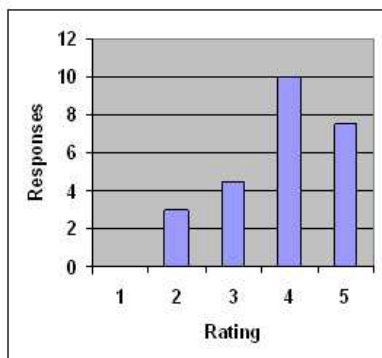


Figure 5.3 Satisfaction with the amount of advisor time available through the SSA programme [clients' views]

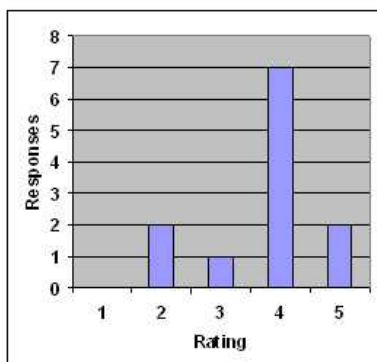


Figure 5.4 Satisfaction with the amount of time available to spend on a particular client [advisors' views]

When asked whether their time could have been put to better effect, 40% advisors thought that their time would have been better used in increasing the involvement of stakeholders in the Travel Plan network (in particular senior management) and assisting clients with implementation. Others mentioned that technical assistance with analysing travel survey responses was not necessarily the best use of their time, and might usefully be done by someone with specific expertise - for example, from the local authority.

5.3.3 Quality of Reports

Overall, the clients reported a very high level of satisfaction with the final reports that they received from the advisors, as can be seen by the chart in Figure 5.5. Using the 1(low) to 5(high) rating scale, schools rated their satisfaction at 3 or above, on average slightly higher than non-school clients.

Figure 5.5

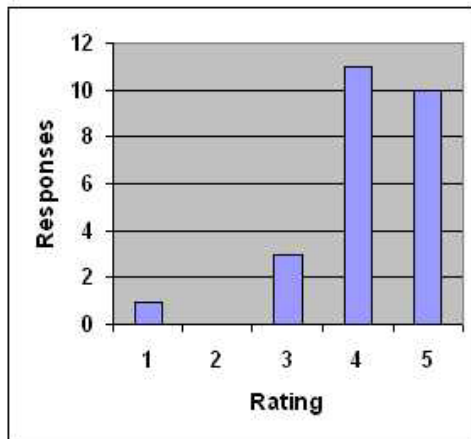


Figure 5.5 Clients' rating of the quality of the final report received from the advisors

However, the project team conducted an independent document evaluation, which was somewhat less positive. According to AEAT guidelines, in the Final Report, advisors are supposed to give an analysis of the problem, provide guidance on solutions/recommendations and include a bullet point action plan that the organisation can implement. Figures 5.6-5.8 show the project team's rating of the Final Reports, according to these criteria. These suggest that there remains some room for improvement regarding problem analysis and development of recommendations.

Figures 5.6 to 5.8

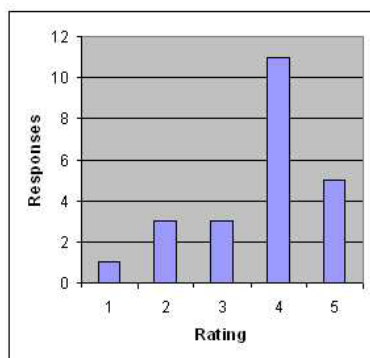


Figure 5.6 Analysis of problem

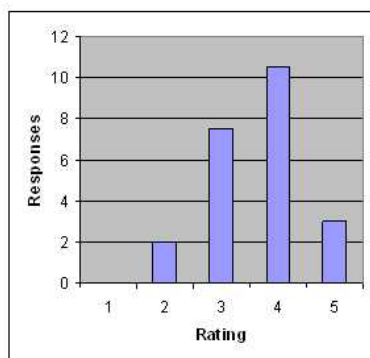


Figure 5.7 Guidance on recommendations

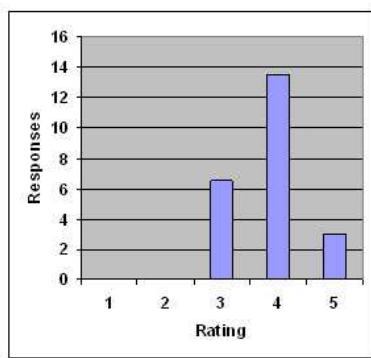


Figure 5.8 Bullet point action plan

In addition, it was noted that, while most reports had a very clear report structure, many had no contents list, summary or a map of the site. Almost a fifth of final reports provided only a 'poor' understanding of site issues. Perhaps most importantly, although the majority did provide some kind of action plan, only around a third were sufficiently clear with respect to three out of four criteria

including "next steps, longer-term goals, and timescales for action and who is responsible for each action". The overall rating of the reports, by the project team, is given in Figure 5.9.

Figure 5.9

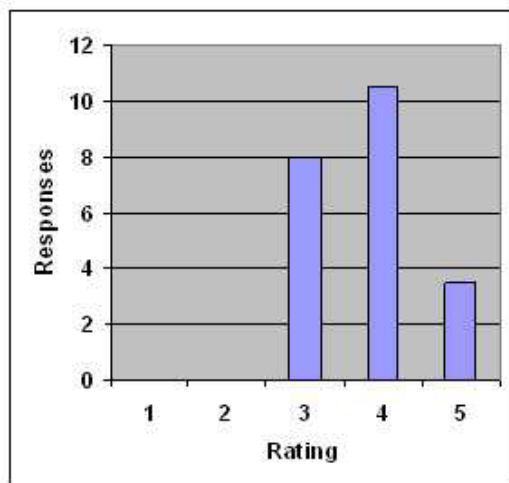


Figure 5.9 Overall rating of final reports by the project team

To some extent, the discrepancies between the project team's evaluation of the reports, and the clients' views, are likely to result from the broader perspective of the clients, who (we suggest) view and evaluate the reports as part of a whole SSA process. Similarly, many advisors do not consider writing the report to always be the best use of advisor time and some commented that they preferred to spend more time with the client, and less time writing reports. For example, one advisor was quoted as saying "I'm more 'hands on' and don't provide all the 'gumph'". This is an important issue, which may be useful to explore in more detail in the later stages of our research.

Over 70% of advisors interviewed were 'clear' about the final report requirements. However, it should be noted that reporting procedures have been changed, and our sample of completed projects would not involve those under current reporting requirements (*see Appendix 2 for the current advisor contract specification*). It is recognised that the variety of tasks involved in undertaking SSA makes a standardised report proforma inappropriate. However issues of presentation would be relatively easy to implement, notably the inclusion of the elements noted above such as maps. It is also felt that moving from a bullet point action plan to a more detailed work plan (with timescales and responsibilities allocated) may help in achieving the shift from strategy to practice.

5.3.4 Overall client satisfaction with SSA programme

"We received good advice - it's the implementation that is more of a problem" [Client]

All clients rated the advisors' general knowledge of Travel Plans positively (scoring at least 4 out of 5). Although still broadly positive, the clients' ratings of the advisor's understanding local context and/or their of the organisation were slightly less good, with one or two cases giving a low rating.

In general, around 80% of clients were either satisfied or very satisfied with both the appropriateness of the recommendations they received, and the SSA programme as a whole (as shown in Figures 5.10 and 5.11). When asked what were the most beneficial aspects of the scheme, client mentioned the following: the fact that advice was free, having an advisor who was time-dedicated, could lead Travel Plan process and was an independent source of information who could liase with network including senior management, and that advisors would provide strategic advice and support specific tasks (such as conducting a baseline travel survey).

Figures 5.10 and 5.11

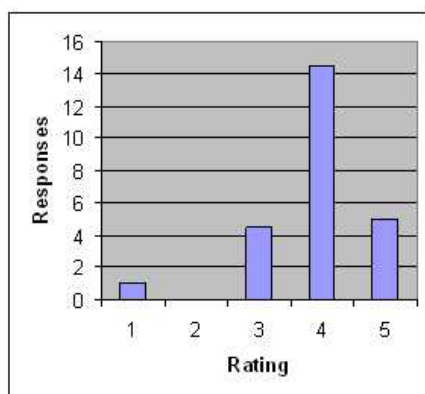


Figure 5.10 Clients' views of the appropriateness of the advisors' recommendations to their situations

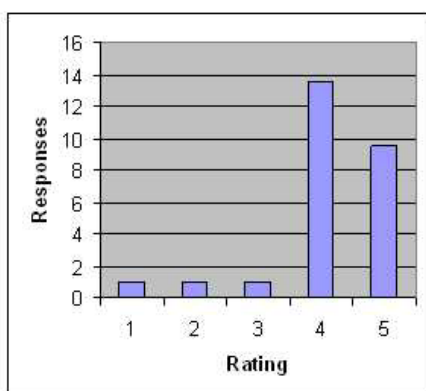


Figure 5.11 Clients' overall satisfaction with SSA

Key findings:

- The initial phase of giving advice often involves defining what help is required.
- Advice given often relates to general support and strategic issues, rather than more specific, technical aid.
- Advisors believe that gaining the support of senior management is often more important than the client initially envisages. Many advisors think that their time allocation for SSA would often be better invested in pursuing this goal.
- Many of those both receiving, and giving, advice think that being able to spend more time per client would be useful, with only a small amount of additional time suggested.
- The final reports produced satisfy the client, but could be improved in terms of their legibility and usability and by the inclusion of a clearer work plan for the future.
- In general, most clients are very satisfied with the advice that they receive, with only a few recording dissatisfaction. Nonetheless, there may be some scope for improving advisors' knowledge of the local contexts, and the types of organisation to which they give advice in future SSA allocations.

5.4 Impact of the advice

5.4.1 Strategic impacts of the SSA

"As a result of SSA, our knowledge went from 0% to 100%" [Client]

There is strong evidence that client knowledge and understanding of the Travel Plan process has increased due to involvement in the SSA programme. In over 85% of cases, clients provided examples

to support this conclusion. In particular, many clients reported that they had become more aware of the strategic organisational factors that are crucial to the success of a Travel Plan.

Figures 5.12 and 5.13

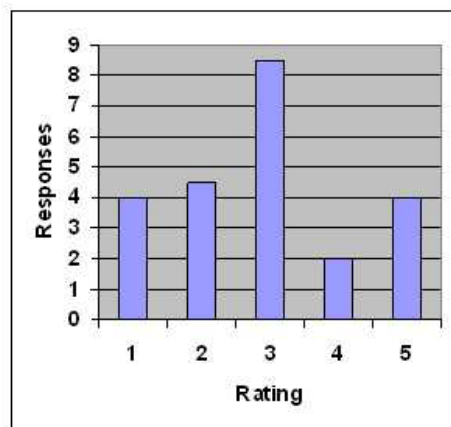


Figure 5.12 Client's perceptions of senior management commitment to the Travel Plan before the SSA project

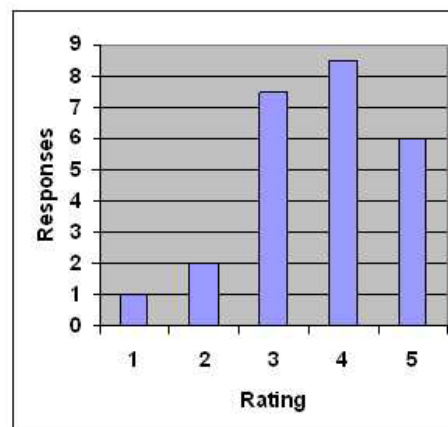


Figure 5.13 Client's perceptions of senior management commitment to the Travel Plan after the SSA project

The SSA also seems to have been effective in increasing the amount of staff time and money committed to the Travel Plan. This is an important impact of the SSA. At the time of seeking SSA, around a quarter of the clients had some specified staff resources for their Travel Plan. Following SSA, this was true for over a third of the organisations. However, it should be noted that the majority of Travel Plans still depend on non-dedicated staff. Budgets have also increased as a direct result of the SSA project. Prior to receiving SSA, only one client organisation had a budget for its Travel Plan. This was £30,000 for a pilot project. Post-SSA, over a quarter had budgets for their Travel Plans (although, in many cases, this was only a few hundred pounds). Further analysis is needed to explore this issue in more depth.

Analysis of client perceptions also suggests that senior managerial commitment to the Travel Plan has improved as a result of SSA (see Figures 5.12 & 5.13). This suggests that major changes were achieved within the organisations in terms of commitment to Travel Plans. This shift was particularly noticeable in non-school clients of which, prior to SSA, over 80% rated senior management commitment at 3 or less. After SSA, 80% of non-schools clients changed their rating to 3 or more. (Advisors were asked a similar question, about changes in the seriousness of the client towards developing a Travel Plan, and their responses showed a broadly similar picture.)

5.4.2 Overall changes in Travel Plan quality

Despite the problems noted above, both clients and advisors feel that the SSA has improved Travel Plans. As shown in Figures 5.14 most clients assessed the improvement in the top two 'positive' categories.

Figure 5.14

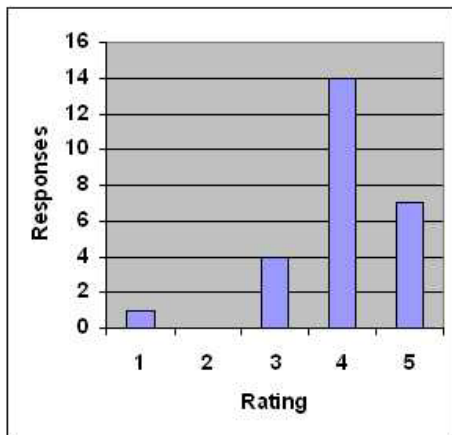


Figure 5.14 Clients' assessments of the overall value of SSA in improving Travel Plans

The advisors' assessments (Figures 5.15 and 5.16) show a generally negative view of clients' Travel Plans before the SSA, moving to a more middling score afterwards. This seems a realistic assessment; that SSA makes a difference, but alone will not totally transform an organisations' Travel Plan.

Figures 5.15 and 5.16

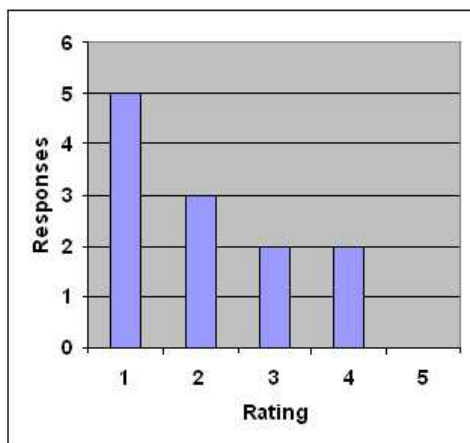


Figure 5.15 Advisors' assessments of the quality of client Travel Plans prior to SSA

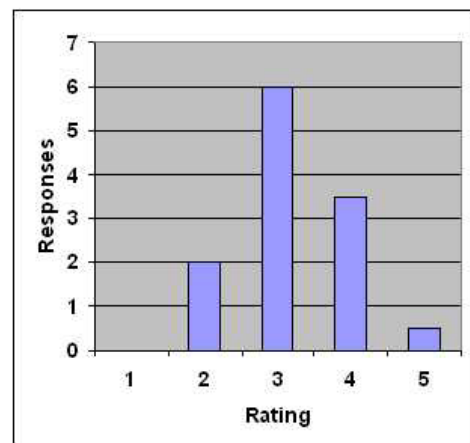


Figure 5.16 Advisors' assessment of the quality of client Travel Plans after receiving SSA

5.4.3 Implementation of Travel Plan measures

"The staff car parking charge was simply not supported by all senior management" [Advisor]

The study sought to analyse the effect of the SSA programme on the level of successful implementation of Travel Plan measures. Over half of clients said that there were travel planning developments or changes that had *only* taken place as a result of SSA, while almost two-thirds reported that developments or changes had taken place *more quickly* as a result of the programme. Advisors thought that both new and quicker developments or changes had resulted from the SSA in most cases. However, in general it appears that the SSA projects have provided the means for organisations to implement a mix of infrastructure and organisational measures. Clearly most of the Travel Plans are at an early stage, and implementation was only just beginning (if not yet to occur). Appendix 6 shows the measures recommended (by advisors) for most of the SSA projects analysed

and which of these had been implemented (according to clients). Infrastructure measures are shown in bold and organisational measures have been left in plain text.

An initial survey of the information in *Appendix 6* shows that, for the cases listed (which represent the majority of the sample analysed to date), 164 recommendations were made, of which 53 have been implemented. Therefore, 32% of recommendations have been successfully implemented to some degree (though some may have been subsequently removed). If infrastructural and organisational measures are separately analysed, then the levels of successful implementation are 45% and 29% respectively. (Note that measures categorised as 'infrastructural' range from low-cost bike storage facilities to major road improvements.) This suggests that, in general, it may have been easier to implement infrastructure measures, and often Travel Plans focus on these as they are viewed to be easier than organisational measures.

Interestingly, for the schools and hospitals analysed, the equivalent ratios⁵ for successful implementation of all measures are 41% and 20% respectively. For infrastructural measures the ratios are 48% for schools and zero for hospitals. For organisational measures, the respective ratios are 38% and 21%. This suggests that schools are generally more successful in implementing both infrastructural and organisational travel measures than are hospitals. Furthermore, the hospitals studied have had no success in implementing infrastructure measures at all. These results can, in part, be explained by the fact that advisors are less likely to recommend large scale, and often prohibitive, high-capital infrastructural solutions to schools, opting instead for achievable low cost measures. (Unfortunately, to date, an insufficient number of businesses have been analysed to quantify their success in implementation.)

Analysis of which recommendations have been implemented in each of the case studies is ongoing. However, whilst the overall picture seems broadly positive, it is also clear that nearly all clients examined to date were unable to implement at least one of the measures recommended by their advisor. The main reason given by clients was usually some sort of opposition (either from senior management or trade unions, or due to parental attitudes or safety fears). The second major category of reasons given for failing to implement suggested measures was lack of resources. Again, according to advisors, key barriers that block implementation are senior management attitudes and policies. Further analysis will be carried out to investigate whether these barriers that clients report are indeed barriers or are in fact understood by advisors to be excuses (perhaps due to more widespread resistance to implementation which is then 'blamed' on particular players in the process, such as management or a trade union). Note that further analysis is also required regarding the overall level of success of advisors' recommendations, and which types of measures are more or less successful in being implemented.

Key findings:

- SSA is making a substantial different to clients' understanding of Travel Plans, and is increasing the commitment of staff time and resources (although these allocations often remain small).
- Notably, clients tend to stress the way in which the changes brought about by SSA related to galvanising internal support and learning factors. In contrast, advisors more frequently discussed the implementation of specific measures.
- SSA is often improving organisational commitment to the Travel Plan process, although convincing senior management to support particular measures can remain difficult.
- Recommendations from SSA are only being partially implemented, either due to internal or external resistance. The basis of resistance may be opposition to the concept itself or resource constraints.

⁵ Ratio = Number of measures implemented / Number of measures recommended

- Overall, both clients and advisors feel that SSA is resulting in better Travel Plans, with new or faster Travel Plan development resulting directly from the advice.

5.5 Management of the SSA

5.5.1 Management of the SSA programme from the client's perspective

"We found it hard to fill in parts of the PVQ before receiving the SSA" [Client]

Figure 5.17

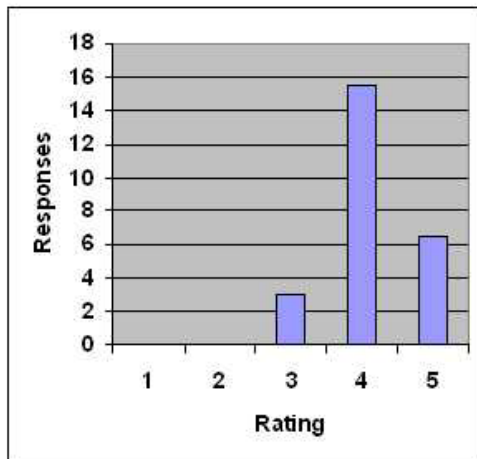


Figure 5.17 Clients' ratings of the overall clarity of the process of applying for SSA (in terms of the information that they received and the forms they had to fill in)

As shown in Figure 5.17, clients were largely positive about the overall application process for receiving SSA. They were also asked, specifically, about the PVQ. Again, responses were positive, although some indicated that it was difficult to provide some of the requested information prior to receiving SSA. (In particular, information about what they had wanted from the advisor, and information on travel surveys.) Advisors were also largely supportive of the PVQ, though some thought it could be redesigned to be both more concise and precise.

However, this analysis is based on organisations that had returned a PVQ and received advice. Information from AEAT shows that, the end of February 2003, over 1,000 organisations had requested PVQs, but only 416 sites had returned them and been offered SSA. This dropout could be due to factors other than the application process, but some advisors feel that the initial paperwork may be a deterrent. In the interview with the SSA manager, it was noted they had followed up where a PVQ had not been submitted. The result of this work was that, overall, it was felt that the PVQ is useful at filtering out less committed potential clients and that it was not discouraging applications from those with a genuine need. Organisations put off by the initial paperwork were not strongly committed to the Travel Plan process and were unlikely to be the most worthwhile recipients of public money.

5.5.2 Management of the SSA from the advisor's perspective

"We need to be getting into the implementation process - and selling the process to senior decision makers." [Advisor]

Overall, all advisors thought that the instructions about their advisory role were 'clear and straightforward', and were generally positive about the management of the scheme, as shown in Figure 5.18.

Figure 5.18

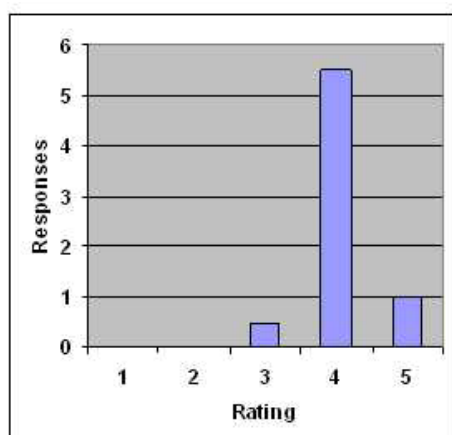


Figure 5.18 Advisor's views about the quality of management of the SSA programme

However, nearly all advisors offered possible suggestions as to how the current programme might be improved. One suggestion was that the invoicing system be streamlined to account for the fact that relatively few days of paid work are spread over a long time period. This often leads to a large amount of paperwork and delay between delivery of the advice and payment. The AEAT manager felt the system was appropriate, but that some advisor consultancies had accounting systems that led to difficulties.

In many of the advisor cases analysed, it was noted that more information and/or training would have been useful. This was particularly mentioned for cases where a junior member of the advisor organisation had been assigned to a client. The need for a more stringent client selection process was also mentioned (on the basis that clients are not as motivated as they need to be - which supports the principle of the current PVQ). Advisors also felt that the scheme would benefit from being advertised more via the Internet and the TransportEnergy Best Practice Programme⁶ telephone helpline was under-utilised. In the interview with the AEAT manager it was accepted there had been problems with the helpline, which predated the SSA programme.

Advisors highlighted the need to make sure that organisations 'get the most out of the SSA, by making best use of advisors' time. In particular, they highlighted a desire to be able to focus on the issues of implementation and/or addressing senior management commitment. The implication is that client expectations may need managing at the point in time when they apply for advice, and, possibly, that there are other sources of advice that they should be directed to, before receiving SSA. Some advisors suggested that, to complement SSA, there is a need to strengthen regional Travel Plan networks. This would both enable organisations to learn from each other's experience, and might also give prospective SSA recipients a better grounding in general Travel Plan issues, so that they could then be more specific about what they wanted from SSA. However, in practice, it may be that 'getting started' is the hardest part of the Travel Plan process, and that one reason why SSA is valuable is precisely because it provides a catalyst for this part of the process.

Key findings:

- Both clients and advisors perceive SSA to be a well-managed programme.
- Those who have successfully completed the PVQ application process do not find it onerous, although there is a large dropout. There are arguments both for and against making this part of the programme less stringent, or alternatively, more stringent.
- Advisors would like some changes to the payment procedures and more training.

⁶ Formerly the Energy Efficiency Best Practice Programme.

Evaluation of school and workplace travel plan SSA programme

- It seems that SSA could be more closely linked with other Travel Plan-related resources, such as websites, telephone helplines, and regional Travel Plan networks.
- Some advisors feel that it would be useful if clients could do more general Travel Plan learning prior to receiving advisor expertise, although it is possible that SSA is critical as a stimulus for an organisation making a serious start to Travel Plan development.

6. Overall value for money of the scheme

At this stage of the Evaluation study, a methodology to estimate value for money of the SSA programme has only been developed for workplace Travel Plans. One of the remaining objectives of the evaluation study is to develop a methodology that is also applicable to schools. This will be included in the final report.

This research shows that the SSA programme has potential for a wide variety of beneficial effects on a number of groups, as shown in Table 6.1.

Table 6.1 Potential Direct and Indirect Benefits of the SSA

For the organisation	For individuals	For transport policy and the community	For the Travel Plan industry
<ul style="list-style-type: none"> ■ Better site management (or more intensive use of site) ■ Savings in parking costs ■ Better utilisation of staff work-time ■ Improved staff recruitment and retention ■ Improved staff health (reduced rate of absence through sickness) ■ Improved knowledge of travel needs management ■ Access to Travel Plan resources 	<ul style="list-style-type: none"> ■ Greater range of travel choices ■ Healthier travel options ■ Cheaper travel options ■ Social interaction opportunities ■ Better use of travel-to-work time 	<ul style="list-style-type: none"> ■ Traffic/ congestion reduction ■ Emissions/ CO₂ reduction ■ Improved public transport/ walking/cycling facilities ■ Greater social inclusion ■ Healthier population 	<ul style="list-style-type: none"> ■ Follow-on consultancy work ■ Higher level of Travel Plan competence

For the Department for Transport, it is important to document the full range of benefits achieved, but a central question is the extent to which the SSA programme represents value for money in addressing transport policy objectives. As noted earlier, the Department's objectives focus upon cutting congestion, reducing the local and global environmental effects of car travel and, for school travel especially, improving levels of health. If the SSA can be shown to provide good value for money for these objectives, any other benefits to organisations, individuals and the Travel Plan industry will be a bonus.

6.1 Mapping the effect of SSA

The SSA projects in our survey have largely been involved with planning and developing rather than implementing Travel Plans, although there is some information on the introduction of measures in a

minority of cases. However, the interviews contain a variety of information on the type of Travel Plan that was *envisaged* before and after the SSA intervention. A method is being explored in this research project that applies a categorisation of Travel Plan effectiveness based upon DfT and other research.

Previous work for the Department for Transport⁷ and subsequent research they have commissioned on the effectiveness of Travel Plans has indicated that up to a 20% reduction in vehicle trips can be achieved. However, this is only attained in the best and most consistently applied Travel Plans. It should be noted that a parallel categorisation would need to be developed for schools, but appropriate information on school Travel Plans is less readily available and a different method may need to be adopted.

Five key categories are based upon the likely reduction in vehicle use of workplace Travel Plans with:

Very little reduction resulting from a Travel Plan consisting only of information-provision

Up to 5% from schemes consisting mainly of car sharing

Up to 10% from those incorporating incentives to use alternative modes

Up to 15% from those incorporating disincentives for car use.

Up to 20% for those that, as well as providing mode-specific incentives/disincentives, also provide additional services/incentives

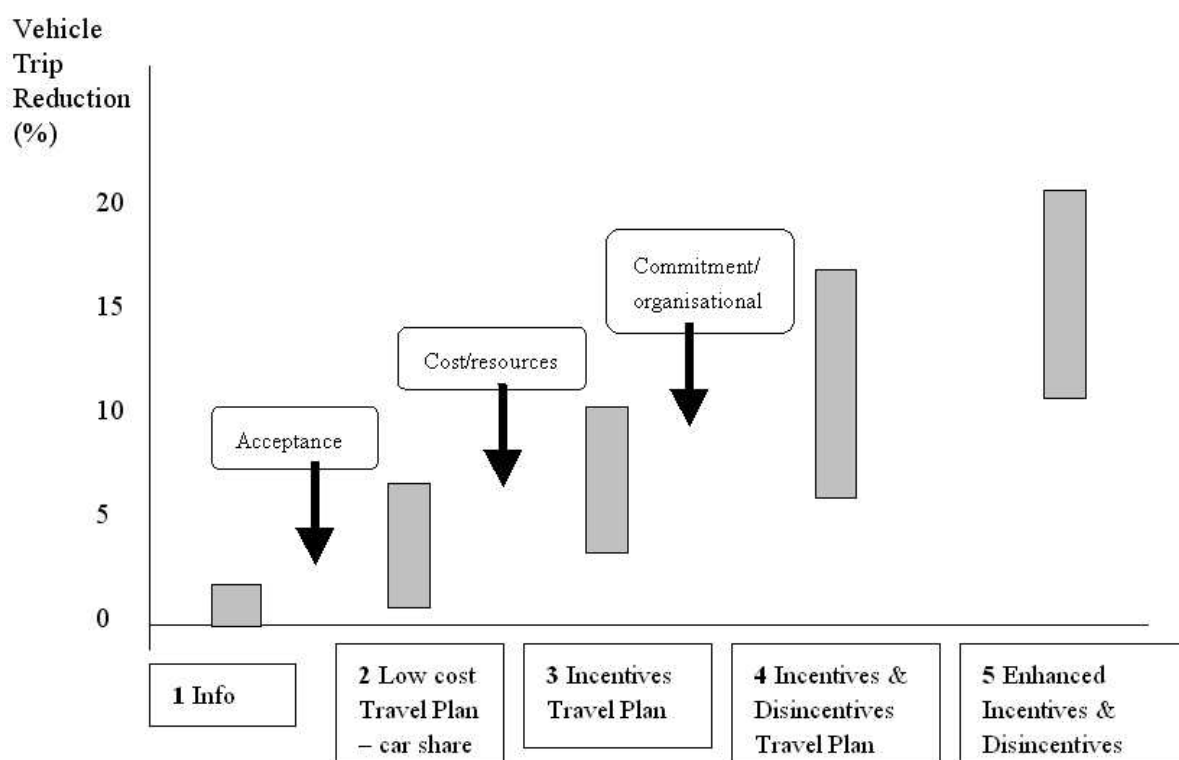
Using this categorisation, it should be possible to 'map' the particular Travel Plans envisaged 'before' and 'after' SSA intervention and estimate the likely change in vehicle use. The SSA could have two important effects. The first is that it does not alter the nature of the organisation's Travel Plan, but does enable more effective implementation. So, for example, the SSA project may have assisted an employer in introducing an effective car-sharing scheme. The result might then be that good take-up is attained with a consequent 5% cut in vehicle commuting trips, whereas, without SSA, the Travel Plan process may have achieved a lesser, 1%, reduction in vehicle trips, with the car-share scheme possibly falling into disuse. The second potential effect is that the SSA results in the organisation moving to a *different type* of Travel Plan, containing more effective measures. For example, receiving SSA could persuade the organisation to move from a low cost Travel Plan, consisting of information measures, car sharing and season ticket loans, to one with incentives such as subsidised bus routes and fares.

These situations can be represented diagrammatically in Figure 6.1, together with the barriers that exist in moving between the types of Travel Plan.

Figure 6.1: Categories of Travel Plans and their effectiveness

⁷ Potter, Stephen, Enoch, Marcus, Rye, Tom and Black, Colin (2001): *The Potential for Further Changes to the Personal Taxation Regime to Encourage Modal Shift*, Final Report to the Department of the Environment, Transport and the Regions, June, <http://www.dft.gov.uk/itwp/modalshift/index.htm>.

Figure 6.1 Categories of Travel Plans and their effectiveness



The barriers faced in making the transition between these categories of Travel Plans are different. Between 1 and 2 it is essentially a matter of organisational acceptance that a Travel Plan is something they should do. Between 2 and 3 the key barrier is winning resources and, here issues arise of how to justify resources to be devoted to a Travel Plan. Once justification is achieved, incentive measures may be provided. The barriers to providing disincentives are very different. These essentially relate to internal opposition to measures such as car park charges or restrictions on parking rights. The barriers here are not essentially one of costs, indeed as some of our study cases noted, introducing measures such as car park charges actually cut the cost of a Travel Plan. The transition between categories 3 and 4 requires organisational commitment and will mark a shift in the Travel Plan from being an isolated estate management measure towards relating to an organisation's core purpose. The transition to category 5 requires a full integration of a Travel Plan to be accepted as a normal business or organisational practice.

The effect of the SSA project can be mapped onto this diagram. Because many of the Travel Plans were still at the planning and design stage, this may be more a matter of identifying how the SSA affected what is planned to be implemented rather than the introduction of actual measures.

Thus one SSA project might move a Travel Plan from category 1 to being a 'good practice' in category 2 (arrow A), whereas another (B) has helped win over senior management to release resources and so move from category 2 to 3. But (B) may not have particularly helped in improving the incentives offered and so there may only be a marginal change in effectiveness.

Using such an approach it should be possible, using the information obtained on our cases, to map the effects of the SSA and make an approximate estimate of the likely subsequent impact on vehicle trips.

Figure 6.2 Effects of SSA

Figure 6.2 Effects of SSA

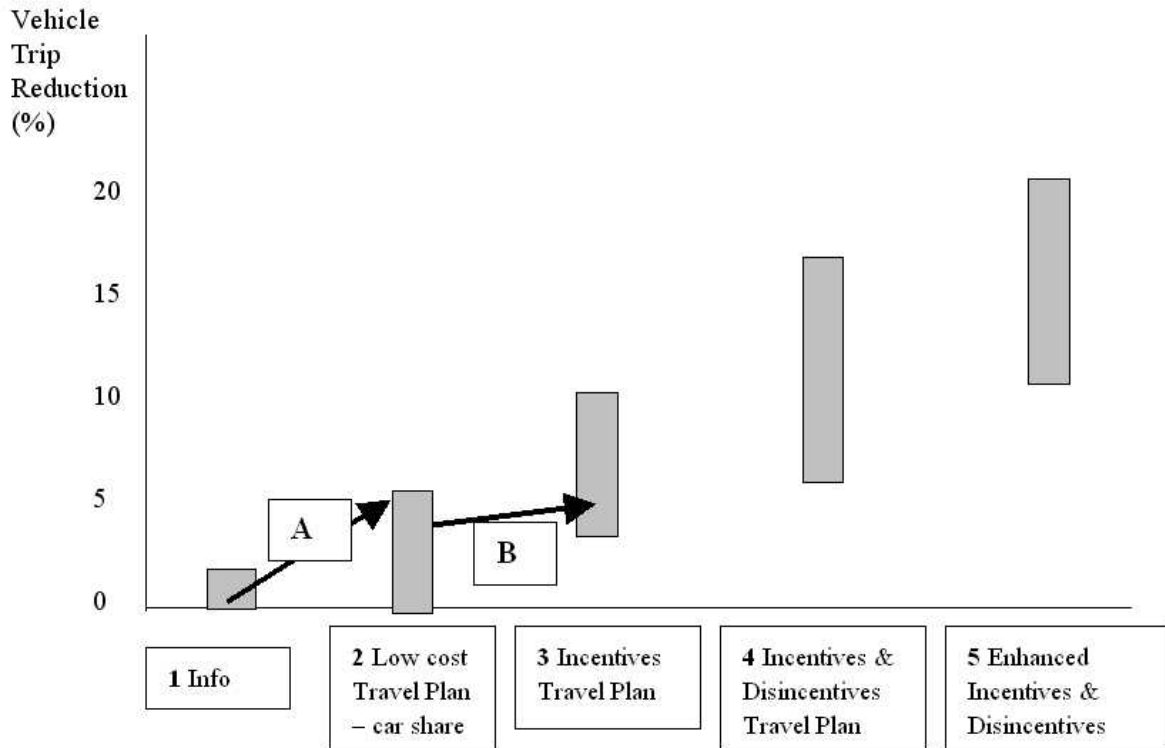


Figure 6.3 represents an initial mapping of 11 of the employer cases from the database. The mapped positions were based upon the questions in the survey about the Travel Plan measures envisaged before the SSA project, what measures were recommended by the Advisor and which of these the organisation expected to implement.

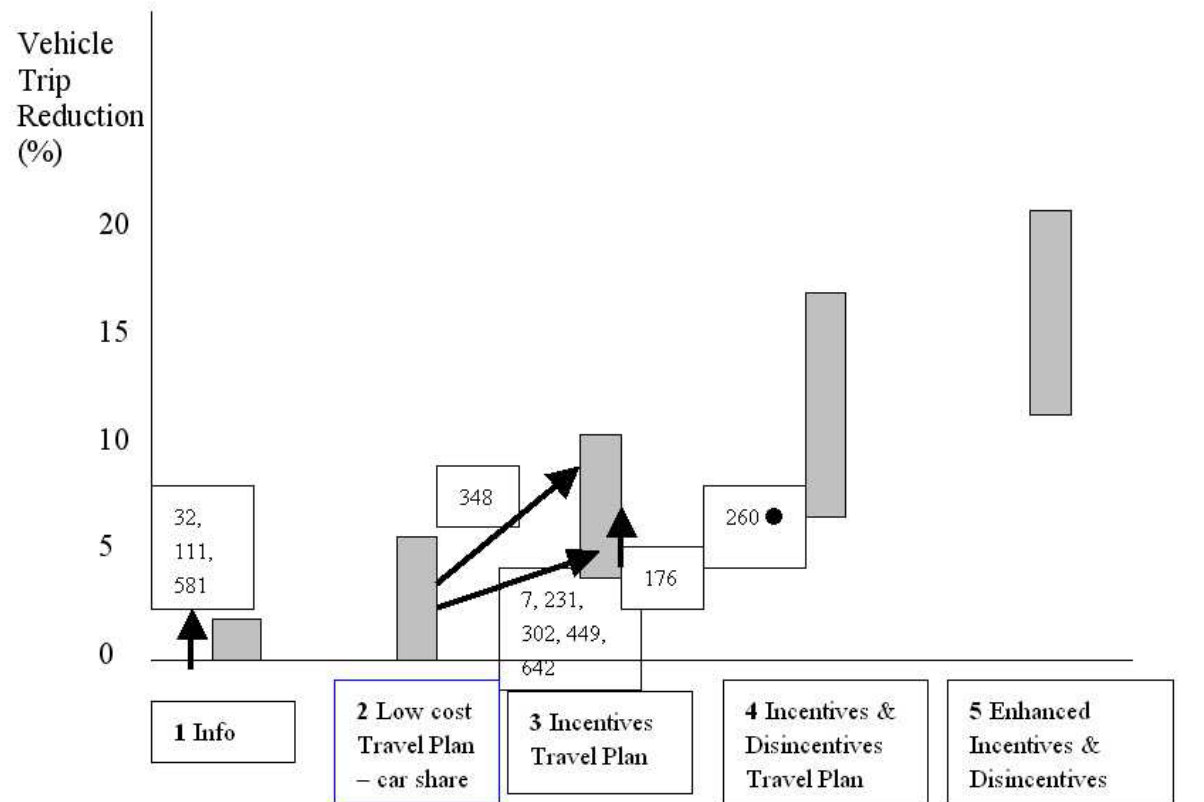
The main transition being addressed is between informational/low cost Travel Plans and getting the resources to move on to offer incentives, with some work on improving the measures themselves and support for their implementation. Although a number of cases mentioned a desire to move to disincentives (usually car park charges), the SSA project did not overcome this barrier.

This preliminary mapping exercise of 11 employers suggests that the effect of the SSA was to produce improvements to the Travel Plans of about a 2% cut in vehicle use in 9 cases, a 4% cut in one case and none in one other case. This averages 2% overall. A more detailed examination of the survey results would permit a more accurate mapping, should this method be adopted.

This is probably an underestimate, as the impact of a particular SSA intervention could well yield greater vehicle trip reduction in the longer term. However, the more cautious estimate of the effects of the SSA programme can be taken as robust. There can be confidence should this level of implied reduction be sufficient to indicate that the programme represents 'good' value for money.

Figure 6.3 Mapping of 11 SSA Employer Cases (project number)

Figure 6.3 Mapping of 11 SSA Employer Cases (project number)



6.2 Estimating the Transport Benefit

According to the National Travel Survey, the average car commuting by people employed full or part-time was 3,587 miles per year (or 5,933 kilometres) as a car driver. A litre of petrol produces about 2.4 kilograms of CO₂ and a litre of diesel about 2.7 kilograms. A figure of 2.5 kilograms per litre would represent an average for all cars, allowing for the petrol/diesel mix in the car stock. The average UK fuel economy is 9 litres per 100km, although the driving conditions for commuting trips might well involve a poorer fuel economy than the average.

If the average fuel economy were taken, then each vehicle commuting trip produces about 1.3 tonnes of CO₂ emissions per annum.

For car trips to school, the distances are less. The National Travel Survey notes that the average 'Escort Education' trip is 2 miles in length, so this will involve around 800 miles per annum. Using the same fuel consumption figures as for commuting, this produces an estimate of 0.29 tonnes of CO₂ emissions per annum per escorted car school trip.

6.3 SSA cost in cutting vehicle trips and CO₂ emissions

Using the estimate that the workplace SSA projects were likely to improve clients Travel Plans so as to produce a 2% cut in car driver trips, then an estimate can be made of a consequent cut in car trips and CO₂ emissions attributable to the SSA project. It should be emphasised that the following is a very approximate calculation for the 11 workplace SSA in order to explore the use of this method. It will be refined in Phase 2 of the project to a greater level of precision. The method would also need adapting for School Travel Plans, where there is less general information on their effectiveness.

The employers in our survey were, on average, quite large (particularly due to the hospitals and as some projects involved groups of employers). The average number of employees was around 2,500. The National Travel Survey shows that about 60% of employees commute alone by car. Taking this to be the case, then 1,500 employees would be commuting alone in each of our SSA cases. A 2% cut would represent a cut by 30 vehicle commuting trips.

At an average of 3,600 miles per year, those 30 vehicle commuting trips represent 108,000 car miles. At 1.3 tonnes of CO₂ emissions per annum per car, 30 car commuting trips produces 39 tonnes of CO₂.

The SSA is a one-off project, so the costs too are one-off, whereas the effects will continue to be felt over a number of years. A very pessimistic view of the SSA would be to divide the cost of a SSA project by only the effects in one year. The average cost of SSA is £2,560 per site with an average project length of 5.1 days⁸. If this were divided by the estimated changes in the number of vehicle commuting trips for one year alone, the cost per vehicle trip cut would be £85 and the cost per tonne of CO₂ cut is £66. A similar calculation could be undertaken for congestion reduction and health benefits, using data for these benefits per vehicle distance.

If a more reasonable assumption were taken that the SSA effect would last for a total of three years, then the cost per vehicle trip cut would be £28 and the cost per tonne of CO₂ cut £22.

By way of comparison, the tax concession on employers subsidising bus fares in the 2002 Budget was estimated to cost at least £140 *per annum* per vehicle trip cut (approximately £0.54 per vehicle trip avoided each working day) and £110 *per annum* per tonne of CO₂ cut⁹. Even using pessimistic assumptions taken for the SSA programme, with costs being set against improvements for one year alone, the SSA programme comes out well compared to other policy measures to manage traffic and reduce CO₂ emissions. The result would stand even if costs were somewhat higher and impacts somewhat lower than have been assumed in these scoping figures.

Overall these initial findings suggest that the SSA programme is very good value for money.

⁸ Source AEAT. This includes AEAT's administration costs

⁹ Potter 2001 et al, op cit

7. Conclusions and Recommendations

7.1 Main Conclusions

The survey shows that many organisations seeking SSA are at the initial stage of developing a Travel Plan and often lack a clear idea of what help they require, or the extent of the task they face. They are also largely unaware of available resources and support. An important role of an SSA Advisor is to provide strategic guidance on what organisations need, not simply help with specified tasks. In particular, gaining the support of senior management is often more important than the client initially envisages. Many advisors think that their time allocation for SSA would often be better invested in pursuing this goal.

In general, most clients are very satisfied with the advice that they received, with only a few recording dissatisfaction. Nonetheless, there may be some scope for improving Advisors' knowledge of the local contexts, and the types of organisation to which they give advice in future SSA allocations. The final reports produced satisfy the client, but could be improved in terms of their legibility and usability and by the inclusion of a clearer work plan for the future.

In terms of the impact of the SSA programme, it is clear that it is having a number of beneficial effects. In particular:

- SSA makes a substantial difference to clients' understanding of Travel Plans, and is increasing the commitment of staff time and resources (although these allocations often remain small).
- Clients stress the way changes brought about by SSA relate to galvanising internal support and learning factors, although convincing senior management to support particular measures can remain difficult.
- Recommendations from SSA are only being partially implemented, either due to internal or external resistance. The basis of resistance may be opposition to the concept itself or resource constraints.
- Overall, both clients and advisors feel that SSA is resulting in better Travel Plans, with new or faster Travel Plan development resulting directly from the advice.
- In terms of value for money for the Department for Transport Investment, initial estimates suggest that the SSA programme is more cost effective than some other policy initiatives in terms of reducing CO₂ emissions and effecting modal shift.

Both clients and advisors perceive the SSA to be a well-managed programme. Those who successfully completed the PVQ application process do not find it onerous, although there is a large dropout. It seems that SSA could be more closely linked with other Travel Plan-related resources, such as websites, telephone helplines, regional Travel Plan networks and (particularly) local authority Travel Plan advice. Some advisors feel that it would be useful if clients could do more general Travel Plan learning prior to receiving advisor expertise, although it is possible that SSA is critical as a stimulus for an organisation making a serious start to Travel Plan development.

7.2 How the SSA scheme might be improved

At this stage of the appraisal project, recommendations about how the SSA scheme might be altered need to have particular caveats and the production of this paper and the associated seminar is intended to obtain feedback from a wider audience on the implications of the research results to date. In some cases, emerging issues will require further research in the later stages of the project. Current views from the project team are as follows:

Gaining senior management support: It is clear that advisors see this as critical, and it often forms a more important part of a particular SSA/Travel Plan process than clients imagine prior to taking part.

One possibility would be to make providing an opportunity to discuss with senior management a key requirement for organisations that seek SSA. The improvements in resources available for travel planning that appear to result from the SSA may suggest that advisors have an authority with management that in-house coordinators do not. Hence, this important 'leverage' is unlikely to be replaced by other forms of advice and this is a clear example of how, without the SSA programme, it is likely that there would be a slower rate of Travel Plan development nationally.

Improved reporting: It is unclear whether further time to producing the final report would always be the best use of advisors' time. However, it is important that such reports should be easy to negotiate (with contents lists, a site map and an overall summary). Requiring reports to provide a more detailed work plan (in terms of who is responsible for doing what, and by when) might help to bridge the gap between Travel Plan strategies and implementation.

Travel plan stage: advisors are often involved at the early stages of Travel Plans. In part, they help organisations both to articulate what they want from the advice and to identify overall Travel Plan needs. It is possible that they therefore act as an important catalyst in helping Travel Plans to get started. However, some advisors feel that advice at the early stage could be provided by other methods. For example, the relevant local authority could deal with some technical issues, such as the appropriate application of survey techniques (This would, of course, be dependent on the availability of suitable local authority resources). Within this general issue, there is the specific issue as to whether the application process should screen out 'non-serious' applicants, or be more open, in the hope that receiving SSA will guide the less resolute organisations to a greater level of Travel Plan commitment. A better use of the helpline might be appropriate here.

Advisor requirements: advisors would like better financial procedures for the scheme, and more training. Clients' views of advisors suggest that knowledge of local context, and knowledge of the organisations in which they work are two areas where advisors' skills could be improved. Given that many clients are beginning the Travel Plan development process, it is also very clear that advisors need to be flexible, and supportive, not simply technically skilled.

Time available: both clients and advisors think that a modest increase in the time per client would be useful, but there is a danger of this leading to too much dependence on government subsidy. One way to avoid such a problem might be to make a follow on 5 days available at half cost. This would thus require a commitment from the client organisation while still providing a positive incentive.

Integrating with other sources of advice: it is clear that the SSA projects are not always well-linked with all the other forms of Travel Plan advice available. Clients do not seek SSA via all possible routes, many are unaware of other sources of advice and advisors feel that the programme could be better linked with current web and telephone Travel Plan dissemination. Within this general issue, the links between local authorities and the SSA programme are unclear, and further research is needed to ensure that there is synergy and support rather than replication or antagonism. The level and skills of local authority Travel Plan coordinators varies, as does their commitment and longevity to the post. This relates to the general skills shortage in the transport planning profession, but also to the perceived short-term nature of the bursary posts.

It could be useful for Advisors to concentrate on 2 or 3 geographic regions, and their contract of appointment include spending at least half a day meeting with the respective LA teams on a six monthly basis to establish the working relationships. This is an approach that has been used effectively in Leicester, Northamptonshire and Oxfordshire.

Satisfaction/dissatisfaction: overall, levels of satisfaction with the SSA are very high. A key issue is to understand why this is not the case in a small minority of organisations.

8. Completing the Research

The results of the Interim Report represent the findings of the first phase of the SSA Evaluation. Further data collection and analysis will continue over the coming months to complete the study. The final results and recommendations will be presented in a Final SSA Evaluation Report and Seminar that are timetabled for December 2003.

In the coming months, work will be conducted both to clarify the interim findings and to address issues that require further investigation. This work will include completing the case study interviews, to increase the proportion of businesses and advisors among the sample and to investigate the reasons why some SSA projects have not been completed (categorised as 'premature completion'). The 'value for money' methodology will also be refined and applied to schools as well workplace client cases.

Other issues that require further consideration include the relationship of the SSA scheme with local authorities (including Travel Plan bursary post holders) and the role of client 'clusters'. This will be conducted through interviews with key local authorities personnel who are central contacts for clusters of SSA recipients in Cornwall and in other areas. Further analysis is also required to more fully ascertain the level of success of advisors' recommendations, to identify which types of measures are more or less successful in being implemented and to more fully understand the remaining barriers to implementation.