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# Evaluation of pilot programmes of site specific advice on travel plans - summary

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## Executive Summary

### 1. Introduction

This is a summary of research which was carried out to evaluate the effectiveness of providing site specific advice to schools and organisations developing travel plans. The project was undertaken by the Transport Studies Group at the University of Westminster in conjunction with Cleary Hughes Associates and Social and Transport Research Services. Details of how to obtain the full report are provided at the end of this summary.

The research focused mainly on evaluating two pilot programmes of site specific advice launched by the Department of the Environment, Transport and the Regions (DETR) in 1999, one for schools and one for organisations. The programme for **schools** offered advice using one of nine different approaches. It started with 38 schools but two of these dropped out during the course of the programme. The programme for **organisations** offered five days of advisers' time (from a panel of advisers), including up to three site visits, travelling time and reporting. Thirty-seven organisations received advice through the programme. In addition, 18 further organisations received smaller amounts of advice (between 4 and 30 hours of consultancy time) through a related programme and were also included in this evaluation.

For the purposes of this report, those 37 organisations participating in the pilot programme will be referred to as SSA (Site Specific Advice) organisations and the further 18 organisations receiving ad hoc advice will be referred to as NPOs (Non-Pilot Organisations).

The project has also evaluated some of the other forms of advice offered by local authorities, voluntary groups, chambers of commerce and others.

## 2. Objective of the Research

The main objective of the research was to evaluate the two pilot programmes of site specific advice to determine whether they had:

- Added impetus to the development of travel plans at the pilot sites;
- Helped the organisations and schools to overcome obstacles; and
- Aided implementation.

In addition, the contractors were asked to advise on whether and how the programme should be expanded in the light of the experience to date

## 3. Survey Methodology

The evaluation consisted of a number of different stages:

- **Review of existing material** - The advisers involved in providing the site specific advice produced reports for each of the pilot sites they advised. These were reviewed in order to identify issues which should be included when the schools and organisations were questioned. The review also covered other relevant material produced in connection with the pilot programme, such as the final reports produced by the manager of each of the pilot programmes and the quality control questionnaires that some organisations had returned.
- **Initial Contact** - Initial contacts were made by telephone with all of the sites which received advice (i.e. 38 schools and 55 organisations - 37 SSA and 18 NPO) in order to identify those sites which it would be most appropriate to examine in detail. After an initial telephone call to gain their co-operation and arrange an appointment, a questionnaire was sent to each school or organisation and a brief interview was conducted by telephone.
- **In-depth Interviews** - The purpose of the in-depth interviews was to explore in greater detail the impacts of the advice at selected sites. Following the initial telephone interviews with the pilot sites, a decision was made as to which sites should be selected for more detailed study. The sites were selected to ensure that a range of different types of school and organisation were covered. Detailed consultations were undertaken with 26 organisations (20 SSA and 6 NPO) and 20 schools, split equally between face-to-face meetings and further telephone interviews.
- **Consulting the Advisers** - The programme managers and a sample of the advisers from each of the pilot programmes were contacted to obtain their views on certain issues and also to help in the assessment of the skills that an adviser needs. All of the advisers involved in both programmes were also contacted by email at an early stage in the project, to provide them with the opportunity to raise any issues they felt should be taken into account in the evaluation.
- **'Control' Interviews** - There was also a need to consult a sample of 'control' schools and organisations (i.e. those which had received no site specific advice) in order to assess the added value

which providing the advice had achieved. Appropriate 'control' sites were identified at the start of the evaluation project. Basic information was collected by telephone from ten schools and ten organisations for comparison with the pilot schools and organisations.

- **Evaluation of Other Forms of Advice** - All the schools and organisations who received site specific advice were asked what other forms of advice they had used and how useful they had found them. Interviewees were provided with lists of sources such as guidance documents and seminars. In addition, a sample of the other sources of advice which are most comparable with the pilot programme were evaluated in more detail. In-depth interviews were undertaken with the each of these other providers of advice and with a small sample of the schools or organisations they had advised - these were a mixture of telephone and face-to-face interviews. Five sources aimed at schools and four aimed at organisations were evaluated in this way.

## Response Rates

Table 1 summarises the number of interviews undertaken in the main part of the study.

**Table 1: Interviews undertaken**

	No. of Sites	Initial contact	In-depth
<b>Pilot Organisation (SSA)</b>	37	35 (95%)	20 (54%)
<b>Non-Pilot Organisation (NPO)</b>	18	14 (78%)	6 (33%)
<b>All Organisations (total = SSA + NPO)</b>	55	49 (89%)	26 (47%)
<b>Pilot School</b>	38	36 (95%)	20 (53%)

Thirty-five of the 37 site specific advice (SSA) **pilot organisations** (those who received site specific advice through the pilot programme) and 14 of the 18 other **non-pilot (NPO) organisations** completed initial contact interviews. This means that basic information is available for 49 organisations. Only six organisations declined to take part and a few of these said that this was because the relevant contact person had left and their replacement 'knew nothing about it'.

Thirty-six of the 38 **pilot schools** completed initial contact interviews. One of the schools for which no information was obtained was one of the two which had dropped out of the pilot programme at an early stage. At the other school which did not complete the initial contact interview the Headteacher who was the main contact had been seconded elsewhere and it was impossible to make contact with him.

## 4. Advice for Organisations

## **4.1 Evaluation of Site Specific Advice for Organisations**

The following sections draw on both the initial contacts and the in-depth interviews. This allows for a broad picture from the full set of responses from the 49 organisations (35 SSA and 14 NPO), plus greater detail from the 26 organisations (20 SSA and 6 NPO) that were interviewed in-depth.

### **Reasons for Participating**

A few organisations had very specific reasons for seeking SSA and identified particular issues that the advice might help them address e.g. *'keen to get more advice on car-sharing schemes or tax implications'*. From the in-depth interviews it was apparent that in virtually all cases the interviewees had made the decision to apply for the programme themselves and it was not something that had been delegated to them.

### **Previous Work on Travel Plans**

The amount of previous work on travel plans varied significantly among the organisations participating and eight of the organisations had not taken any action towards developing a travel plan prior to receiving the advice.

### **Expectations for the Programme**

The 20 SSA organisations interviewed in-depth were fairly evenly divided as to whether the advice had met their expectations. Six of them felt it had met their expectations and a further three that it had even exceeded them. Three organisations found it difficult to say whether the advice met their expectations, perhaps because they had not really thought out in advance what they would like to achieve from the advice.

The remaining eight SSA organisations interviewed in-depth (40%) felt that the programme had failed their expectations. Several of the organisations (of varying levels of experience) had expected to get a much greater level of 'hands-on' support or technical assistance from the adviser.

Four of the six NPOs interviewed in-depth felt the programme had failed their expectations and only two that it had met them. NPOs' expectations had not been met usually because of the limited amount of assistance that was available to them.

### **Type of Advice Sought**

About two-thirds of the organisations said they had not sought advice on a particular problem, but were looking for general assistance with taking their travel plan forward or with introducing initiatives to reduce car use. The most common areas mentioned by those organisations who had been looking for help with a particular problem were: gaining the support of senior management, promoting the travel plan to staff and addressing parking problems.

### **Contact with the Advisers**

The amount of contact that organisations had with their advisers during the programme varied. Just under two-fifths of the SSA organisations had spoken or met with their adviser at least once a month, but a similar proportion had spoken or met only at least once every three months. Not surprisingly, the NPOs were more likely to report low levels of contact with their advisers. Four of the 14 NPOs (almost a third)

had spoken or met with their adviser less than once every three months.

Two-thirds of the SSA organisations thought the amount of contact they had was about right and the rest felt they had too little contact. The NPOs were slightly more likely to feel that they had had too little contact - 6 of the 14 NPOs (almost half) gave this response. Several organisations particularly mentioned their concern that the amount of contact they had with their adviser was limited by the fact that time spent on travel or reporting to DETR had to be included in their allocated number of days.

Most of the SSAs (just under 60%) found the visits from the adviser very useful, 30% said they were quite useful and only 10% (4 organisations) said they were of little use. Interestingly, the NPOs were slightly more positive with around 70% describing the visits as very useful and 20% as quite useful. Although the purpose of the research was to evaluate the impact of the advice rather than the advisers, it was clear that the attitude of the advisers influenced the way that organisations responded to their visits. From the in-depth interviews it appears that participating in the pilot had been a very negative experience for three of the organisations which they usually attributed to the adviser they had been allocated. They felt that their particular adviser lacked the enthusiasm necessary to motivate them into action or was unwilling to undertake the type of assistance they would like. This was, at least in part, due to the nature of their relationship with the adviser as discussed below.

### **Client-Consultant Relationship**

It was clear, both from some of the in-depth interviews and from talking to some of the advisers, that, because the consultants were commissioned by a third party, there was not the usual client-consultant relationship. Only two organisations explicitly expressed concern about this, but the fact that organisations were not paying for the advice themselves obviously led to difficulties in a number of cases for both the organisations and the advisers. Advisers often had to 'chase' organisations to ensure that the organisation used the allocated number of days and there was a greater requirement for the consultant to maintain the momentum than would normally be the case when working for a client who was paying for the work directly. From the organisations' perspective, the fact that they were not paying for the advice meant that they felt that they had less control over what the advisers could do and were therefore dependent on what the advisers were willing to do.

### **Impact of the Advice**

In the initial contact interviews, two-thirds of the organisations said that receiving the advice had encouraged them to take more action on travel plan issues. When asked to describe what progress they had made on their travel plan in the past year only nine organisations (about 20%) appeared to have made no or very little progress. Four of these were NPOs, so 30 of the 35 SSA organisations had made progress.

Of the 30 SSA who described positive progress in the past year, half had produced a travel plan (at least in draft) or improved an existing one and over a third had undertaken a staff travel survey. Twenty-one (60%) of the SSA organisations felt that they would not have made the same progress if they had not received the site specific advice. However, all but one of the 13 SSA organisations who felt that they would have actually made the same progress without the advice were among those who had made quite significant progress in the last year. These were often organisations who were already quite advanced and had been hoping for more practical 'hands-on' assistance from their adviser. It should also be noted that a number of those who had not made progress commented that this was due to other factors (often internal organisational issues) rather than anything to do with the advice they had received.

About half of the 26 organisations interviewed in-depth felt the advice had helped with the implementation of their travel plan. Most of these felt that it had generally speeded up progress and that they would have achieved the same without the advice, but it would have taken a long time. Some were able to identify particular actions which they would have done differently, or not at all, if they had not received the advice. Several organisations commented that the advice had enhanced the quality of their staff travel questionnaire, or speeded up the survey process.

In general, it seems that the advice has aided implementation most at sites where there had already been some work on developing a travel plan and there were particular issues that needed resolving. The duration of the pilot programme appears to have been too short for the organisations new to travel plans to have made much progress on implementation. The main impact of the advice in these cases was usually to raise awareness of the issues that needed to be considered in developing a travel plan.

Most organisations said that they would not have been willing to pay for the advice, with a few mentioning that the main appeal of the pilot programme was that they were offered free advice. However, some organisations new to travel plans had retained the services of their adviser after the programme ended and were paying for the additional work themselves. Such organisations were typically either government agencies or those who were producing a travel plan in return for planning permission. They were, thus, cases where there was some degree of compulsion to develop a travel plan which resulted in the issue receiving a higher degree of priority in the allocation of resources.

### **Making Greater Progress**

Organisations were asked to rank a series of measures according to the extent to which they might have helped them make greater progress on their travel plan. The most popular measure was increasing the length of time over which the advice was available (i.e. extending the period over which they could make use of the adviser's time rather than increasing the number of days available from the adviser).

Organisations were also asked to suggest any other measures which might have helped them make greater progress on their travel plan. Some referred to specific aspects of travel plan development that they would like greater assistance with, particularly the survey. Another common request was for greater information about others in a similar situation. This was particularly true for small organisations or those on sites in rural or out-of-town areas or in small towns, who felt that the existing best practice examples were not applicable to their situation. Other comments related to the need to provide financial resources for the implementation of the travel plan, or the difficulties of finding time to devote to developing the plan. A few organisations felt they would have benefited from stricter deadlines or a different relationship with the adviser. About a fifth of the organisations could not suggest anything which would have helped them make greater progress.

More suggestions for other forms of assistance were made in the in-depth interviews where a common request was for greater assistance in getting the travel plan message across to staff or management. One organisation suggested that 'the Government could help by providing evidence of the success of travel plans' and ensuring that more monitoring takes place to provide the evidence required.

### **Use of Guidance Available**

Over three-quarters of the organisations who completed initial contact questionnaires had heard of the DETR publications, "A Guide to Green Transport Plans" and "The Benefits of Green Transport Plans" and around two-thirds had heard of the more recently published "A Travel Plan Resource Pack for Employers". These were also the three most commonly used documents. Just under half had heard of "Changing Journeys to Work" (the earliest document on the list, published by Transport 2000 in 1997) and "Developing an Effective Travel Plan: Advice for Government Departments" (the most recent document published by DETR this year). Comments made in the in-depth interviews suggest that there is a lot of good published guidance available, but it is now *'getting to a level where it is a bit repetitive'* and *'there is too much repetition of the same examples'*. Others felt they lacked the time to *'distil the really relevant parts'* of the information available.

About half the organisations had heard of the regional seminars organised by DETR and ETSU and most of these had attended one. Just over a third had attended a local event organised by their local authority and around a fifth had attended other national or regional events.

About three-fifths of the organisations had contacted DETR and around half had been in contact with their local authority for advice on travel plan issues. Slightly fewer (45%) had contacted the Government's Environment and Energy Helpline.

## **4.2 Evaluation of Other Advice for Organisations Developing Travel Plans**

Four 'local' sources of advice to organisations developing travel plans were evaluated in more detail as part of this project. They included initiatives organised by a local authority, a non-governmental organisation, a chamber of commerce and a health authority in conjunction with local authorities and others. The aim was to see what lessons could be learnt from the way in which others were supporting those developing travel plans. Information is also drawn from a previous evaluation undertaken by the Transport Studies Group of one of the earliest sources of advice on travel plans - the Nottingham City Council Mobility Adviser. Successful elements identified from these other sources of advice included locally based advisers, the opportunity to network and share ideas with other local organisations developing travel plans and assistance with travel surveys.

## **4.3 Lessons Learnt**

The evaluation of the pilot programme and these other sources of advice for organisations identified a number of factors which contribute to the success of such initiatives:

Flexibility of timing - In situations where the employer is not in a position to develop a plan immediately, the adviser should contact them again at a future date as their situation may have changed.

Long-term commitment - From the sources studied, the advisers appear to have the most impact with organisations that have been receiving advice over a period of at least 18 months to 2 years.

'Hands-on' assistance - Organisations particularly welcome practical assistance with survey work.

Networking - The opportunity to share ideas and experience at regular meetings with other local organisations appears to be very important.

Site visits - These are an essential element and a very effective way of ensuring that the adviser understands the particular circumstances of an organisation, its site and its staff.

Location of the adviser - Advisers based within local authorities can be very effective, but those who were based within other local organisations were often particularly successful as they are viewed as an 'independent broker' in negotiations with the local authority and public transport operators.

Other support - There is a need for local authorities to consider seriously how they can best support organisations developing travel plans through the provision of physical measures in the vicinity of their site.

Role of adviser - A particularly important role for the adviser appears to be as an outside voice to convince staff and management of the advantages of a travel plan.

Size of organisation - Advice appears to be most successful with the largest organisations (500+ employees). Such organisations should be encouraged to introduce travel plans first and could then act as a catalyst for other neighbouring organisations.

Skills of an adviser - Advisers need good communication skills, persuasion and patience, as well as an understanding of transport planning and policy issues and a knowledge of where to look if they do not know the answer themselves.

Disseminating information - The use of email and regular newsletters seemed to be useful ways for advisers to distribute up-to-date information and keep in touch with the organisations they were working with.

## 5. Advice for Schools

### 5.1 Evaluation of Site Specific Advice for Schools

The pilot programme for schools piloted nine different techniques to guide, encourage and facilitate schools to prepare, adopt and implement school travel plans. The nine different methods are set out in Table 2 with details of the numbers of school who received each approach and the numbers who were interviewed at each stage in the project. The intention was to identify the most appropriate combination of methods for a comprehensive approach to offering advice to schools. All the methods except the **telephone help-line** and the **out of school training day** involved at least one visit to schools. Every effort was made to ensure that the methods were evenly represented among the schools chosen for in-depth interviews. However, a few schools were unable to participate in an interview within the timescale available or had to cancel appointments at short notice and it was not always possible to substitute them with a school that had received the same approach.

**Table 2: Numbers of interviews with schools receiving each of the approaches**

	<b>No. of Schools</b>		
	Receiving approach	Initial contact interviews	Interviewed in-depth
<b>Telephone help-line</b>	4	4	3
<b>School working group organisation and co-ordination</b>	4	4	2
<b>Single school visit</b>	4	4	2
<b>Assistance for Local Authority School Travel Co-ordinator</b>	4	4	2
<b>Out of school training for a school's Travel Co-ordinator</b>	8*	8	5
<b>Use of best practice guides</b>	4	4	2
<b>School travel survey and preparation of issues, problems and options report</b>	4	4	3
<b>Media and community approach</b>	4	3	1
<b>Classroom work</b>	2**	1	0
<b>Total</b>	38	36	20

\*One school was unable to attend the training day

\*\*Both these schools dropped out before the pilot was completed

The following sections draw on both the 36 initial contacts and the 20 in-depth interviews with schools.

### **Reasons for Participating**

Over a third of the schools said they had applied for the programme in order to supplement their existing limited knowledge or to educate and inform themselves about school travel issues. Schools' other significant reasons for applying were because they wanted to address road safety concerns or improve pupils' health.

### **Previous Work on Travel Plans**

The most popular action on travel plans taken prior to the start of the programme was to have carried out a travel survey, followed by having sought information from another source, and having identified a member of the school community to take responsibility for developing the plan.

### **Expectations for the Programme**

Just over a third of respondents indicated that their involvement in the project had met their expectations and a further third that it had surpassed their expectations, whilst the remaining schools felt that it had fallen short of what they were expecting. In summary, over two-thirds of respondents felt the programme had at least met their expectations. Those involved in the **telephone help-line** and **out-of-school training day** approaches were most likely to feel that their expectations had not been met, attributing this principally to a lack of site specific advice owing to the absence of any school visit by the adviser.

### **Type of Advice Sought**

About a quarter of the schools wanted general advice on preparing and implementing a travel plan, for example 'how to put together a plan, including all the things we wanted to do, particularly how to express it and how to initiate it'.

### **Contact with the Advisers**

Overall, over a quarter of the schools had contact with their adviser at least once a month, while two-thirds had less contact (at least once every three months). Half the respondents considered the amount of contact about right, a third thought they had too little, but there were also two pilot schools that felt they had too much contact with their adviser. Those in the last category were schools that were struggling to make headway with their travel plan, and felt pressurised by the progress-chasing contact from their adviser: this was particularly true of the **telephone help-line** approach. There were two approaches for which schools were more likely to indicate that they had received too little contact: the **out-of-school training day**, and the **single school visit**.

All the in-depth interviewees who had received the **telephone help-line** approach indicated strongly that they felt a meeting with their adviser would have meant they would have got more out of the project: a meeting preferably at the school so the adviser could familiarise themselves with the relevant issues. Some of those involved in the **out-of-school training day** and the **single school visit** commented that they felt their approach lacked follow-up support and mentoring, which they would have liked.

About two-thirds (15 out of 24) of the respondents who had personalised face-to-face meetings (i.e. all those except the recipients of the **out-of-school training day** or the **telephone help-line** approach) felt the contact they had with their adviser was very useful. Only two out of the 12 schools who did not have personalised face-to-face meetings on site found the contact useful. There was a general consensus that those advisers who visited pilot schools had a much better understanding of what the site specific problems were. Those who had received only telephone contact commented that it was rather more difficult to get enthusiastic over someone you had never met.

### **Impact of the Advice**

The vast majority of schools interviewed in-depth indicated that, to a greater or lesser extent, they had accepted the advice offered, but some added the caveat that to accept advice is one thing, but to (be able to) act on it is quite another. Three-quarters of all the schools involved in the pilot indicated that receiving the advice had encouraged them to take more action on travel plan issues than would otherwise have been the case. The activities undertaken by the greatest proportion of schools that were influenced by the advice were: having sought information from the local authority or elsewhere (47%); having carried out a travel survey (36%); and having set up a working group to develop the travel plan (33%). Two-fifths of pilot schools indicated they had carried out a travel survey within the past year but this had been planned

anyway and was not influenced by the programme of advice.

The control schools appear to have remained active in the development of travel plans, but in areas of other activity, rather than the types of actions the pilot schools were being steered towards (e.g. promoting discounted pupil bus passes and using software to map/analyse pupil travel behaviour). In terms of future action, it appears that the pilot schools plan to undertake more action relating to their travel plan than the control schools, measured by the number and variety of planned actions indicated.

This suggests that participating in the pilot has helped them to plan ahead and develop a longer-term strategy for implementing their travel plan.

### **Making Greater Progress**

All pilot schools were asked to rank three measures according to the extent to which they might have helped them make greater progress on their travel plan. A third ranked more training for their travel plan co-ordinator as the highest priority; a quarter indicated that having advice over a longer period would have made the greatest impact on enabling them to make progress towards their travel plan; and a fifth suggested that having more days over the same time period would have helped them the most. The most common suggestion for other measures was for more support or help from other interested parties, particularly from local authorities. Several schools wanted more time or financial resources and a few schools suggested that they would like more assistance with survey work or wanted an adviser with more local knowledge.

### **Use of Guidance Available**

The most widely known guidance document is Transport 2000's "A Safer Journey to School", followed by information from Sustrans, and then "School Travel Strategies and Plans - A best practice guide for local authorities", produced by the DETR. These were distributed to all schools as part of the programme so it is not surprising that these were the most well-known. In general far fewer respondents had either heard of or attended events relating to school travel plans, compared to those who had familiarity with guidance materials. Three-quarters of respondents had made contact with their local authority; half had had contact with Sustrans; and over a quarter had contacted DETR.

Some of the approaches appear to have increased the level and improved the nature of schools' contact with their local authority: the **school working group** approach, the **joint working with local authority** approach and the **media and community** approach fall into this category.

## **5.2 Evaluation of Other Sources of Advice for Schools**

Five other sources of advice for schools developing travel plans were evaluated in detail in order to identify the lessons to be learnt. Three of the initiatives studied were organised by local authorities and two by grant-aided non-governmental organisations. This evaluation again emphasised the importance of advisers with local knowledge and an ability to tailor advice to the individual needs of a particular school.

## 5.3 Lessons Learnt

The evaluation of the pilot programme and these other sources of advice for schools identified a number of factors which contribute to success in the encouragement of school travel plans:

### Advisers

- Advice should be tailored to individual schools' needs and local knowledge on the part of the adviser is very helpful.
- Enormous amounts of time can be saved by schools if the adviser has an extensive source of political, local government and technical contacts, including specific names where possible.
- Advisers need experience and a general awareness of relevant issues and to be able to draw readily on information and experience from elsewhere.
- Schools should be advised of possible sources of funding, such as district, borough and parish councils, grant-awarding trusts, and local businesses.

### Schools

- Ensuring the support of parents and school governors is important: they may show a higher initial level of commitment than teaching staff.
- Schools should be encouraged to make use of teaching resources concerning sustainable travel issues.
- Concerns about children's fitness and independence can be as powerful motivators for parents and school staff and governors as concerns over road safety.

### Local authorities

- Co-operation from an early stage between different local authority departments is essential.
- It is recognised that certain procedures must be followed by local authorities when wishing to introduce physical measures and it may be difficult to shorten the timescale required for these. However, every effort should be made by local authorities to ensure that slowness in the bureaucratic process is not allowed to stifle schools' enthusiasm and that the momentum is maintained.

## 6. Conclusions and Recommendations

The research has found that, in the case of both organisations and schools, there are certain situations where the provision of site specific advice from an independent adviser has clearly added value to the development of travel plans. However, there are other situations where the provision of this form of advice has not succeeded. It is recommended that an improved version of each of the programmes is continued and rolled out more widely, but that a number of improvements are made to ensure that the programmes are providing assistance more cost effectively.

### 6.1 Successful Elements of the Pilot Programmes

**For organisations** - In general, the most successful outcomes were achieved where the adviser spent some time helping the organisation identify key barriers preventing progress on their travel plan and develop a programme for the adviser's time that best met the needs of the organisation. It was important that advisers were flexible enough to try and provide whatever seemed most appropriate for a particular

organisation, but persistent enough to ensure that the organisation made progress. The most successful advisers had the experience and willingness needed to get involved in a variety of issues, including gaining the support of senior management, negotiating with bus operators and assisting with survey design and analysis. They also had a good understanding of local issues and the particular circumstances of individual organisations.

**For schools** - In general, the most successful approaches were those which involved all the relevant stake-holders in the development of the school travel plan e.g. the local authority, parents, pupils, governors and local residents. Other factors which contributed to a successful outcome were on-going and fairly regular contact involving at least one carefully pre-planned school visit but preferably with follow-up visits to assess progress.

Elements of each of the following approaches were more likely to lead to success: **school working group, joint assistance with local authority, school travel survey, single school visit, media and community.** However, several of the other approaches could also be successful if used as part of a package of measures which also included site specific advice. This is particularly true of the **telephone help-line approach** and **the out of school training day.** It is recommended that site specific advice to schools should involve at least one visit to the school by the adviser, to meet those who will be involved in the project and to become familiar at first hand with the issues faced by the school. A second site visit is recommended some six to twelve months after the first, to assess progress and to give schools something to work towards. However, additional visits may be necessary for schools struggling with their travel plans.

## 6.2 Improving the Effectiveness of the Programmes

**Promotion** - The number of **organisations** responding to the initial promotional activities was so low that virtually all of them were able to participate in the pilot. The number of **schools** that applied was higher but was still only a small proportion of all schools in the country. While the promotion of travel plans has increased since the programmes were initially launched, continued efforts should be made to promote both these programmes if they are to be continued and travel plans more generally to a wider audience. This will be essential if any future programmes are to aid take-up in schools and organisations that do not already have some interest in this area.

Attempts should be made to place articles in the mainstream press, both national and local, and in relevant journals. For **organisations** this would include publications aimed at professionals with an interest in staff travel, such as facilities managers and personnel officers. The promotion should focus on the issues that are likely to influence organisations to implement travel plans, such as potential cost savings and the fact that future legislation may increase the cost of providing workplace parking. The issue should be promoted to **schools** in publications aimed at teachers and parents and through national organisations for school governors. The benefits that schools should be made more fully aware of include: improved pupil health and fitness, a better environment around the school, pupils' social development and road safety skills, and better relations with school neighbours.

**Selecting the Advisers** - For both schools and organisations, the advisers who achieved the most success were those who had previous experience of the implementation as well as the development of travel plans in a range of settings. A personal commitment to travel plans, enthusiasm and an ability to motivate organisations were other important attributes, as well as local knowledge. Advisers who understood how schools or particular types of organisations function also tended to be more successful. This is particularly

important for **schools** where an adviser, who can work within the constraints the schools face in terms of limited time and resources and their teaching commitments, is more likely to be able to assist the school in developing a workable travel plan.

Careful consideration should be given to the selection of the advisers with the most appropriate experience and to the matching of advisers to the needs of the organisation or school. It is important to recognise that there is a limited pool of expertise available and that, ultimately the limited availability of advisers with the right characteristics is likely to dictate the size of the programme, in terms of the number of sites that can be offered advice.

**Selecting the Schools and Organisations** - There is clearly a need for schools and organisations to demonstrate some form of commitment if the advice is to be as effective as possible, but this commitment should not be so onerous as to deter those in need of advice from applying. An appropriate commitment might be for the organisation or school receiving the advice to agree to a named person spending a certain amount of time on progressing the travel plan. An alternative commitment for **organisations** could be that the Board (or equivalent) will be prepared to attend a presentation by the adviser and consider a business case for the travel plan.

Both schools and organisations should demonstrate a commitment to share the knowledge they gain from the adviser with others in their organisation (e.g. by setting up a working group). **Schools** selected to receive site specific advice should not be expecting an Ofsted inspection during the academic year in which they receive the advice, as they would be unlikely to be able to devote sufficient staff time to a travel plan during the period of the Ofsted inspection.

**Better Briefings** - It is clear that the impact of the advice was reduced in some cases because some advisers did not feel it was appropriate to undertake particular tasks, such as negotiating with bus operators or assisting with survey work. This was less of an issue for the **schools'** advisers, although they were sometimes constrained by the restrictions of the particular approach they were using and some schools did seem to feel they had not got quite what they were expecting. In addition, in both programmes some sites had unrealistic expectations of what could be provided.

It is recommended that much clearer guidance is given to advisers on what their role should be and that organisations and schools are also better briefed on what they can expect to get from the adviser and encouraged to seek clarification from the programme manager if problems arise. In the case of **schools**, any continuation of the programme would not focus on one particular type of advice so advisers would not be constrained by the need to keep to a particular approach.

**Meeting Schools' and Organisations' Needs** - It is recommended that the appropriate programme manager should be involved in initial discussions with each site to determine what they are hoping to get out of the advice. A more specific brief and allocation of time could then be drawn up and the assignment allocated to the adviser most suited to fulfil that brief. In cases where the school or organisation had a lot of difficulty in identifying what they needed help with it would be particularly important that they were allocated an adviser who was able to help them identify their problems and develop an appropriate programme of assistance for them. The briefs should still allow some flexibility to enable the adviser to deal with any issues which emerge in the process of providing the advice and could also include an agreement on what the school or organisation would be expected to commit to in return for receiving the advice. Both the sites and the advisers should be encouraged to contact the programme manager if they have any concerns about the progress of the work.

**Guidance Documents and Information** - It was clear from the in-depth interviews that some recipients were not aware of documents that they might find very useful. Other recipients knew of the information that was available, but had not had the time to study it to discover what lessons there were of particular relevance for them. It should be an important function of the adviser to draw attention to the printed materials available and to direct those they advise to the parts of the material that are of most relevance to their situation. In particular, case studies of initiatives adopted by those in similar circumstances are helpful in reassuring and encouraging those new to the process.

**Ensuring Sites Benefit from the Advice in the Long-term** - Advisers should be encouraged to help schools and organisations develop a strategy which ensures work on the travel plan continues after the adviser's involvement ends. This could include identifying opportunities for them to network with other schools or organisations in their area developing travel plans or others of a similar nature, and providing contacts to their local authority or others that may be able to offer further support. In addition, the adviser's brief could include a follow-up contact a year after the initial advice had been received. Knowing that the adviser would be returning might encourage organisations and schools to maintain the momentum on their travel plan.

Some **organisations** were encouraged to contact the Energy and Environment Hotline if they had any queries or needed technical assistance on particular issues after the site specific advice had ended. This should be something that all advisers promote to the organisations they work with.

There is also a need for some form of equivalent ongoing information service for **schools** developing travel plans, accessible either by phone or email. The role of this service would be to answer technical queries, satisfy requests for examples of good practice, offer advice on a particular problem, and advise where to access other information or help. Although the telephone help-line was not one of the most successful approaches tested in the pilot, such a service is likely to be more useful when offered as a supplement to, rather than a replacement for, site specific advice.

**Making the Timetable More Flexible** - It was clear that some schools and organisations were not able to make best use of the advisers' time because it did not come at the right time for them or was available over too short a period of time. A larger-scale programme should, within reason, allow greater flexibility in the timescale and, where appropriate, allow schools and organisations to spread the days available over a longer time period.

**Reducing the Contractual Burden** - Several of the **organisations'** advisers commented on the onerous nature of the reporting and contractual procedures required for the pilot, which could take up a significant proportion of the time allocated for each site. Whilst it is recognised that some of this is due to the fact that it was a pilot programme which required thorough monitoring, the amount of time required for such procedures should be kept to a minimum in any larger programme to ensure the limited resource is used most cost-effectively.