

**School Travel Plan Quality Assurance – Advice Note**  
**September 2007**

We have developed the national minimum standard as a means of ensuring, as far as possible, that the content and quality of school travel plans (STPs) are such that they should ensure longevity, assist with the delivery of each STP's specified objectives and targets, and generally be as effective as possible in bringing about long term change.

However, we now need to update the Quality Assurance (QA) Advice Note to reflect changing Government policies and priorities. These include Every Child Matters, Change for Children, extended schools, 14-19 agenda and the requirements of the Education and Inspections Act 2006, in addition to the National Healthy Schools Standard criteria and other developments.

We have therefore made some changes to the information considered to be 'essential' and 'desirable' for inclusion in a STP in order for it to meet the national minimum standard and be approved for the allocation of a devolved formula capital (DFC) grant.

In addition, we recognise that some sections of the previous QA Advice Note were open to interpretation and we have therefore revised the Evidence Checklist in order to clarify what is expected.

**'Essential' and 'Desirable':**

For a STP to be approved for the allocation of the DCSF capital grant, it must include information on all the elements listed as 'essential' in the following Evidence Checklist. STPs covering all these elements that also demonstrate partnership working, long term sustainability and ownership by the school are expected to meet the national minimum standard and to be approved for the DFC grant.

The 'desirable' column reflects the excellent work that many schools are undertaking with the help of their school travel advisers (STAs). It also reflects what experienced practitioners have seen works, enabling schools to make significant progress on their STPs' objectives and deliver sustained activity to reduce car use and increase or maintain levels of walking and cycling. This column does not dictate what every single STP has to include, it merely indicates what STAs should be striving to achieve with schools and reflects good practice across England.

## **Partnership working, long-term sustainability and ownership by a school**

Evidence of ownership, sustainability and partnership working are important elements of any STP that cannot easily be identified by specifying mandatory elements for inclusion in each STP. What matters is the impression the reader gets from the overall content and therefore there are no specific elements included in the Evidence Checklist of this QA Advice Note. As an alternative, some general pointers are included in the guidance below. These are as important as any of the 'essential' elements contained within the main Evidence Checklist and, as such, STAs should pay particular attention to them:

### **1. Partnership Working**

The STP **must** demonstrate that all the key stakeholders have been involved in the consultation and development of the plan. Pupils, parents, staff, governors and school councils all play a crucial role.

In addition, there may be less obvious individuals or groups within the school who have a specific interest and can support the process, such as the healthy schools coordinator, a teaching assistant, school crossing patrol, school bursar or caretaker. The establishment of a school travel group is an effective way of bringing together these key stakeholders in the development of the STP.

External partners also have a key role in the development of a STP and should be encouraged to contribute to and sign the plan. Such partners might include a pre-school provider, a neighbouring educational institution, the police, a residents' group, a provider of extended school services, a school transport or public transport provider, a Sports Development Officer and the Primary Care Trust.

There is only sporadic evidence of the involvement of external key partners in STP development to date and it has been the exception rather than the rule for the stakeholders and other individuals named above to be mentioned in STP action plans or for them to be involved in signing off STPs. Such additions, whilst simple, demonstrate to the reader that they have been party to discussions involving their proposed or suggested contributions and that they are already signed up to helping with the delivery of these.

### **2. Long term sustainability of the STP**

Inclusion of the STP in the School Development Plan/School Improvement Plan (SDP/SIP) is perhaps the most effective way to ensure that a plan is sustained and subject to regular review. Engagement in the school travel planning process can be sustained by a variety of means:

- Establish a school travel group to oversee the development and implementation of the STP.
- Include evidence that the STP will be incorporated into the School Development Plan (copy of the appropriate section from the SDP/SIP).

- Provide the governing body with responsibility for monitoring, reviewing and updating the STP and ensure that this appears as an item on their annual agenda.
- Ensure that sustainable travel and road safety are embedded in the curriculum (Geography, PSHE etc).
- Ensure that the objectives of the STP are featured in the school prospectus.
- Link the STP to wider educational activities that support a healthy school and sustainable school ethos and add to the remit of relevant committee meetings e.g. Eco- schools and Healthy Schools.
- Provide a role for the School Council to consider school travel as part of their remit. Some have successfully taken the lead role in developing and maintaining their school's travel plan
- Introduce annual activities and focus events/weeks such as Walk to School Week.

### **3. Ownership by a school**

Whilst we acknowledge that templates can be extremely effective in helping schools develop their STP, as well as ensuring that they include, as a minimum, all the essential elements, schools should be encouraged to use them only as an outline upon which they shape and develop their own unique document. Standardisation of covers, content and whole chunks of text do little to emphasise the individuality of each plan, especially to a third party, when a number are seen together.

Allowing and encouraging schools to present their STP in their own words, format and style truly demonstrates where the ownership of the plan lies and should help to embed sustainability and interest in the outcomes without being pressured by a Local Authority. Pictures, photos, drawings, plans and maps bring a plan to life, help to emphasise ownership by the school and help a third party reader or organisation to understand the context of the STP.

The depth and quality of the monitoring and review process is a good indication of the level of commitment and ownership that the school has of its STP, objectives, targets and action plan.

**Evidence Checklist:**

STP Element	Overview	Supporting Evidence	
		Essential	Desirable
1. Description of the location, size and type of school	<b>“Tell us about your school”</b>	<ul style="list-style-type: none"> <li>• Type – primary/secondary/ independent /Voluntary Aided etc.</li> <li>• Age range &amp; number of pupils. This must include the number of SEN pupils with a statement of need; with a transport element to the statement and a general comment about what impact this may have on travel.</li> <li>• Written description of the locality of the school which sets the context for a third party.</li> <li>• Opening times – pre- &amp; after-school clubs / extended schools.</li> <li>• Transport links – Details of key walking routes, cycle routes, bus services and times and railway stations serving the school.</li> <li>• DCSF Unique School Reference Number (XXX/YYYY)</li> </ul>	<ul style="list-style-type: none"> <li>• Location map and site plan.</li> <li>• Extended/ community use of site.</li> <li>• Photographs.</li> <li>• Facilities (e.g. existing cycle parking, lockers).</li> <li>• Postcode plots.</li> <li>• Details of school catchment area.</li> <li>• No. of parking spaces for staff/visitors.</li> <li>• Current involvement of school in school travel activities and education.</li> <li>• Indication of sign up to other related initiatives e.g. Healthy Schools, Eco schools, sustainable schools.</li> </ul>
2. Description of the travel/ transport problems/ issues faced by a school/ cluster of schools	<b>“These are the reasons why we are doing a STP and the problems we would like to address”</b>	<p>This is a written description of the particular travel issues/ problems at the school and can be in text or bullet format.</p> <p>It should be clear how these problems have been identified and when.</p>	<ul style="list-style-type: none"> <li>• Journeys made during the school day</li> <li>• Travel needs of other users e.g. staff, community etc if relevant.</li> <li>• Future development likely to increase traffic levels or influence travel patterns.</li> <li>• Mission statement or letter of recommendation signed by SMT/ head.</li> <li>• Current involvement of the school in school travel activities and education could also be included here.</li> <li>• Existing policies to ensure good behaviour on public transport, cycling policies etc. should be referenced here.</li> <li>• Travel between school sites could also be considered.</li> </ul>

<p>3. Survey results:</p> <p>How children currently travel to/ from school</p> <p>How they would prefer to travel to/ from school</p>	<p><b>“These are the facts on how pupils currently travel and would like to travel to school.”</b></p> <p><b>“This will help us set our objectives and targets for the travel plan”</b></p>	<ul style="list-style-type: none"> <li>• Date survey undertaken including month and year.</li> <li>• Survey of how <u>all</u> pupils 'usually travel to school' and 'prefer to travel to school'. Report data as numbers, as well as percentages (so that year on year comparisons can be made). Data from the School Census should be used for the baseline on how pupils usually travel to school, where available. If pupil numbers are high and it is not feasible to survey all pupils, a * <u>representative sample</u> should then be surveyed.</li> </ul> <p>In order to measure change over time it is essential that this sample be selected on the same basis each year. Survey data should include key sections of all the school community including sixth form and nursery pupils if present. Report numbers surveyed as well as numbers responded. Survey data should be recent, preferably current school year, but no more than 18 months old.</p> <p>* As school travel patterns may be influenced by age, socio-economic group and SEN, these factors should be taken into account when selecting the sample. One option might be to survey a minimum of one class in each year, provided the allocation of pupils to different classes is not related to factors such as socio-economic group. Alternatively, a random sample could be generated based on the number of pupils on the school roll.</p> <p>In the case of SEN schools it may be</p>	<ul style="list-style-type: none"> <li>• Use (if available) historical data to show progress to date.</li> <li>• Survey of how pupils' usually travel to <b>and from</b> school' (number, percentage and total number surveyed).</li> <li>• To and from data should be surveyed and reported separately as it is not uncommon for pupils to travel by different modes at the start and end of the day.</li> <li>• More detailed questionnaires.</li> <li>• Staff travel surveys.</li> <li>• Parent's survey.</li> </ul>
---	---	--	---

		<p>impractical to involve pupils in surveys. Transport needs of pupils with SEN must be outlined and there must be a description of the number, type and size of vehicles entering the school site together with arrangements for picking up/setting down pupils.</p>	
<p>4. Clearly defined objectives and targets</p>	<p><b>“What specifically do you want the travel plan to achieve?”</b></p> <p><b>and</b></p> <p><b>“What specific goals do you want to reach?”</b></p>	<ul style="list-style-type: none"> <li>• Clear objectives (i.e. statements of intent – what do we want to achieve?) stated within the text and clearly linked back to the issues identified from the surveys and consultation within the STP.</li> <li>• Correlating SMART targets associated with each objective (i.e. a specific point which we want to reach by a stated time) that reflect the survey data and issues identified .</li> <li>• Targets should be specific, measurable, achievable, realistic and time-bound.</li> <li>• All STPs <u>must</u> include at the <u>very least</u>, one SMART target.</li> <li>• Baseline data must always be included as without this there is no standard against which future performance can be measured.</li> </ul> <p>Consideration needs to be given to how targets are going to be monitored and recorded.</p> <p>Where a target for mode share exceeds levels indicated in the preference survey, then the target could be considered unachievable and unrealistic and therefore not SMART. If the target is set above preference level a clear case needs to be made as to why.</p>	<p>NOTE:</p> <p>List of example objectives and targets can be provided for reference by the STA but schools are <u>strongly recommended</u> to draw up their own.</p> <p>Encourage schools to look to 2 – 3 years for longer term objectives.</p>

<p>5. Details of proposed measures</p>	<p><b>“What specific actions/ tasks are you going to take to meet the plan’s objectives?”</b></p>	<ul style="list-style-type: none"> <li>• A clearly defined yearly action plan stating what will be done to meet the STP’s objectives and correlating targets.</li> <li>• Starting from when the school ‘signs up’ or approves the STP.</li> <li>• Actions linked to specific objectives and/or targets illustrating how these actions will achieve the associated target. It should be clear how measures are linked back to objectives, targets and or issues identified through consultation.</li> <li>• Any measure or action that has been identified within the body of the STP should be included within the action plan (or a reason given as to why it is not taken forward).</li> </ul>	<ul style="list-style-type: none"> <li>• Table format covering criteria 5, 6 and 7 i.e. what, when, who.</li> <li>• Adding monitoring activities to an action plan helps to ensure that monitoring tasks are not overlooked. If working group meetings just focus on reviewing action plans that haven’t included monitoring tasks, then important monitoring activities could be overlooked.</li> <li>• Action plans should not just contain new initiatives or proposals but also any existing or ongoing projects such as cycle training, WOW, bus prefects etc, and details of how they will be monitored.</li> </ul>
<p>6. Detailed timetable for implementation</p>	<p><b>“When is each action going to be completed and / or undertaken by?”</b></p>	<ul style="list-style-type: none"> <li>• Clearly state when the action/ activity will be completed and/ or undertaken. Each action must have a timetable associated with it.</li> <li>• State month and year or a specific date.</li> </ul>	<ul style="list-style-type: none"> <li>• Avoid unclear or open statements such as ‘ongoing’ or ‘2008’.</li> <li>• Identification of the risks which would prevent implementation.</li> </ul>
<p>7. Clearly defined responsibilities</p>	<p><b>“Who is going to make sure each action happens?”</b></p>	<ul style="list-style-type: none"> <li>• Individuals should be named and duties should be spread around in order to reduce the load on any one individual within the school and ensure the plan will be sustained. It is advisable to identify specific individuals from larger organisations where their help and support is required to achieve actions identified.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify a lead person within the school to take up any actions with external bodies (e.g. with road safety or engineering depts. in LAs).</li> <li>• Avoid unclear statements such as school or LA or listing the same individual for every action.</li> </ul>

<p>8. <u>Evidence that all parties have been consulted</u></p>	<p><b>“Demonstrate to the reader that the STP is the result of joint efforts by individuals and groups from the school and external groups such as road safety or school travel plan adviser”</b></p>	<ul style="list-style-type: none"> <li>• Say <u>how</u> you have sought to find out the opinions and ideas of <u>all</u> those <u>directly affected by the action plan</u> in the STP.</li> <li>• Who was consulted, how and when? A table format could be included detailing who was consulted, on what they were consulted, and when and how the consultation took place.</li> <li>• Consultation must involve as a minimum parents/pupils, staff and governors. Evidence of the consultation must be included and must involve more than just mentioning or referring to consultation without including an evidence base.</li> <li>• Attach as appendices, or include in the main body of the plan evidence of consultation. This may include things such as examples of:             <ul style="list-style-type: none"> <li>- Findings of detailed questionnaires with parents, pupils and staff</li> <li>- Minutes of meetings with PTA/ Governors/ STP working group/ other related groups within school</li> <li>- School Council involved and tasked with actions</li> <li>- Letters sent home to parents</li> <li>- Newsletters/ displays designed to elicit views and opinions</li> </ul> </li> </ul> <p>NB. Hands up surveys on actual and preferred means of travel on their own would <u>not be</u> evidence of consultation.</p>	<ul style="list-style-type: none"> <li>• More detailed questionnaires allow for greater identification of issues, barriers, possible solutions and innovative ideas eg asking ‘what prevents you walking to school?’ and linking post codes to mode of travel (actual &amp; preferred) to identify potential modal shift.</li> <li>• Parents surveyed and asked for their contribution/ ideas.</li> <li>• Staff survey.</li> <li>• List members of the STP working group.</li> </ul>
--	---	--	--

<p>9. Monitoring and review proposals</p>	<p><b>“How are you going to track whether the actions undertaken are meeting the STP objectives and targets?”</b></p> <p><b>“What are you going to monitor to measure progress?”</b></p>	<ul style="list-style-type: none"> <li>• Say when the next survey(s) will be done. Setting a month and year. This must include update of baseline travel survey information.</li> <li>• Set a month and year for the monitoring review of the STP.</li> <li>• State who (i.e. a specific individual) is responsible for ensuring both survey and STP review will be completed</li> <li>• The STP must include a commitment that the review will consider pupil travel needs arising from new developments in education and transport provision and that the STP will be revised as necessary to take account of these. (This can be inferred from good quality monitoring and review proposals).</li> <li>• Any review of an STP should be planned to start before the action plan has run its course to guard against inactivity.</li> </ul>	<ul style="list-style-type: none"> <li>• It is good practice to monitor actions and initiatives as well as specific targets.</li> <li>• Include ‘success criteria’ or ‘monitoring indicators’ in a column against each action in the action plan.</li> <li>• Make the links to the school development/improvement plan.</li> <li>• Good monitoring proposals linked back to a good quality action plan, with clear activities that have monitoring built in.</li> </ul>
---	--	---	---

**Sign Off**

Where senior officers from the Local Authority have signed off a STP, their name and position should be clearly stated.

It remains the preference of the Travelling to School project board that Deputy Directors of Children’s Services and Transport should sign off individually all STPs submitted by their authority for the DFC grant. However, larger authorities may, if they so wish, request an easement: this may be done by contacting your Regional School Travel Advisor. All other parties who have contributed to the development of the STP or have a role to play in its delivery should also be encouraged to sign off the plan. This applies particularly where the School Council has played a role.

**This document replaces the original 2005 QA Advice Note and Evidence Checklist and should be taken as the definitive reference document for STPs, which will be submitted for consideration of a DFC grant.**