



Smarter Choices, Smarter Places

Supporting Sustainable Travel

A guide to delivering effective
SCSP projects

paths
for all

FOR A HAPPIER,
HEALTHIER SCOTLAND



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Chapter 1

Introduction to Smarter Choices Smarter Places project planning & delivery

1.1 Welcome to this Smarter Choices, Smarter Places project delivery guide

1.1.1 Purpose

This guide is designed for Local Authorities' SCSP lead officers. It seeks to equip you and your colleagues with the knowledge and skills you need to develop and deliver effective smarter choices projects that are compliant with the requirements of SCSP.

The guidance that it contains is intended to help ensure that:

- Smarter choices projects funded by SCSP accord with best practice and learn from experience gained elsewhere, so are more likely to be effective in delivering good value outcomes
- SCSP projects are well managed and efficiently delivered
- The SCSP application process is understood and its criteria adhered to, in order to improve efficiency of the funding allocation both for the funders and recipients
- Risks associated with SCSP projects are reduced

This guidance has been developed in response to feedback from lead officers involved in the early stages of delivery of SCSP in its current form who requested help and support, and to aid knowledge transfer when responsibilities for SCSP delivery change within applicant authorities.

1.1.2 How to use this resource

This guide is divided into 4 chapters, each split into sections and sub-sections to cover specific topics. Topic-related sections and sub-sections include a brief introduction, summary points, and a link to where the specific topic fits within the SCSP timeline, who needs to be involved and links to other guide content and resources:

In developing this guide, together with the accompanying videos and two training days offered to all SCSP officers in 2017, we have recognised and drawn on the rich collective skills, experience and assets within the active travel community in Scotland. As such, this resource has been designed to be a practical guide that you can draw on at any time or stage in a project - you can either:

- Work through this guide sequentially from the beginning, or
- Dip in and out of it depending on where you are in the SCSP annual project cycle or where you have a specific query/need for guidance - each section is designed to be free-standing so you don't need to read the whole guide

Either way, at first viewing it is worth looking at the contents section and having a quick scan of the whole guide to help familiarise yourself with what it covers and how it can support you.

1.2 About the Smarter Choices, Smarter Places programme

1.2.1 The aims of Smarter Choices, Smarter Places

SCSP aims to make walking and cycling the modes of choice for short local journeys in Scotland's towns, cities and villages. It will also encourage other forms of sustainable choices such as public transport use and car share, helping to cut carbon emissions and improve our air quality. It will help reverse the trend towards sedentary lifestyles and tackle health inequalities.

The programme is funded by Transport Scotland (Sustainable Transport team), an agency of Scottish Government and will contribute to achieving the outcomes, visions and aspirations of numerous strategic policy documents, including:

- [Long-Term Vision for Active Travel in Scotland 2030](#)
- [National Walking Strategy 2014 and Action Plan](#)
- [Cleaner Air for Scotland: the road to a healthier future](#)
- [Cycling Action Plan for Scotland 2013](#)
- [National Planning Framework 3](#)
- [Scotland's Climate Change Plan 2017 \(3rd draft\)](#)
- [Refreshed National Transport Strategy](#)
- [Low Carbon Scotland: a behaviours framework](#)
- [Town Centre Action Plan](#)
- [Let's Make Scotland More Active: a strategy for physical activity in Scotland](#)
- [National Physical Activity Implementation Plan: A More Active Scotland – Building a Legacy from the Commonwealth Games](#)
- [Preventing Overweight and Obesity in Scotland: a route map towards healthy weight](#)

The desired outcomes of the SCSP programme are to see:

1. Changes in knowledge, attitudes and beliefs towards sustainable travel choices;
2. Increased walking and cycling modal share for short local journeys;
3. An increase in other sustainable travel choices for longer journeys, i.e. public transport and car share;
4. Reduced car use for short local journeys;
5. Reduced driver only journeys;
6. The building of an evidence base for interventions.

1.2.2 Funding available

A budget of £5 million per annum is available for projects for behaviour change initiatives and is allocated to local authorities on the basis of local population. Grant recipients are required to extend the impact of projects by match funding the SCSP award. At least 50% match funding must be available. **The evidence from the SCSP project outcomes of this funding will be key to securing further funding.** Full details are set out in [section 3.3](#)

1.3 The importance of taking a social marketing and planned approach to deliver SCSP projects

Focused transport initiatives on particular target groups work much better than initiatives based on 'wishful thinking'. Initiatives that have not nailed down whose behaviour they are trying to tackle consequently end up being 'all things to all people' and often result in little sustainable impact or effect.

Taking a social marketing and planned approach helps initiatives: be customer focussed, and be developed and delivered in a systematic and controlled way.

1.3.1 Introduction to the principles of good social marketing

Introduction

This section introduces you to social marketing – what it is, the principles of social marketing, and how they relate to SCSP. These principles underpin the activities required to deliver customer-focussed behaviour change initiatives. They will be used, and unpicked further, throughout this guide.

What is social marketing?

In order to be effective and deliver desired outcomes, behaviour change programmes must be customer-focussed. This means fully understanding your target customer/customer groups and keeping them in focus at every stage of your project.

Understanding and applying social marketing principles in the work you do will help you have the customer focus you need to develop and implement effective and sustainable and active travel projects.

Social marketing uses principles from commercial marketing and the social sciences to change people's behaviour for the social good – to benefit both individuals and wider society. For SCSP projects, these benefits will commonly relate to factors such as improving health and reducing congestion or pollution.

Social Marketing Principles

It is important to note that social marketing principles are not to be confused with the process of how to do social marketing.

What social marketing is not

Social marketing shouldn't be confused with social media marketing, for example using Facebook and Twitter. Social media is simply a tool or channel that is sometimes used within social marketing.



They provide a robust framework to assist those planning and developing interventions to ensure they are consistent with best evidence-based principle and practice in the social marketing field.

Customer orientation

It is absolutely central to have a strong, **customer focus** from the start and throughout a project. This means having a robust understanding of your SCSP customer, based on good market and consumer research, combining data from different sources including involvement from them in shaping and testing interventions.

Insight

To be customer-focussed and fully understand your target market, you need knowledge. You need to build a picture of the people whose travel behaviours you are trying to change through the projects you develop. So, you need good **insight**.

Data, intelligence and research must be gathered that will:

- Help you gain a deep understanding and insight into what influences and motivates the customer.
- Drill down from a wider understanding of the customer to focus on identifying key factors and issues relevant to positively influence travel behaviours.
- Identify and develop 'actionable insights' (discussed in more detail in [section 2.3.3](#)) using considered judgement, rather than just generating data and intelligence.

Exchange

In order to understand customers and the behaviour(s) you want to influence, you need to understand how people weigh up the pros and cons of changing a behaviour - what they perceive might be the attractions to them of walking or cycling, and what is holding them back – what are the barriers and challenges. This analysis of the pros and cons is referred to as **exchange analysis**. The aim is to tip the balance so that active and sustainable travel behaviour is more attractive, and less active/non-active and non-sustainable travel behaviour is less attractive.

'Exchange' analysis - understanding what the person has to give up in order to get the benefits proposed – requires:

- Clear analysis of the full cost to the consumer in achieving the proposed benefit (e.g. financial, physical, social, time spent, etc.)
- Analysis of the perceived/actual costs versus perceived/actual benefits of both the desired and current/undesired behaviour(s) (e.g. time, money and effort)
- Consideration and tailoring of appropriate incentives, recognition, reward, and disincentives according to specific audiences, based on what they value (e.g. getting fitter, avoiding traffic, free travel vouchers etc.)

Competition

You also need insight that gives you a handle on what is competing for your target customer's time and attention. You are trying to get them excited, enthused, attracted into doing something differently, but what's getting in the way of that? **What's competing for their time and attention?**

You need to:

- Look for strategies that minimise the potential impact of competition by considering positive and problematic external influences and influencers
- Make sure both internal competition (e.g. psychological factors, pleasure, desire, risk taking etc.) and external competition (wider influences/influencers competing for audience's attention and time, promoting or reinforcing alternative or counter behaviours) are considered and addressed

Segmentation

Insight, exchange and competition analysis together will allow you to **segment** your market. By segmenting your market/audience you will be able to identify different groups of people with distinct characteristics for which you can prioritise and develop targeted interventions.

Behaviour

Once you're clear on who your target customers/audiences are, you can start thinking about what you want them to do in response to the project. The more precise you can be about what you want them to do, the better. In other words what **behavioural objectives** should be set? This means defining specific, actionable and measurable behavioural goals and key indicators.

Theory

The objectives should also be underpinned by some kind of sense of what's possible. What assumptions, if any, can you make about how your target customer will behave? If you do this, then what will follow? If you develop a project or intervention of this sort how will it actually lead through a process of change for the target audience? In simple terms, that's what is meant by **behavioural theory**. Your assumptions and theories will help to inform and guide the development and delivery of your project, and will help to give you a reference against which you can test performance and results.

Methods mix

Once you're clear on what you're trying to change by way of behaviours and how you think it will work – the theory – you can develop your intervention(s). In order to reduce the cost of engagement and increase the perceived reward in the desired behaviour, more will be required than just giving people information or promotion. You will need to create products or offers for the customer that are attractive, that the customer will see as easy to engage with, fun, and popular.

Therefore, you will need to use **a mix of methods to bring about behaviour change** that do not rely solely on raising awareness. This requires:

- Using all elements of the [marketing mix](#) (product, price, place and promotion) and/or primary intervention methods (inform, educate, support, design and control)
- Promotion to 'sell' the product, price, place and benefits to the target audience, not just to communicate a message
- Taking full account of existing interventions in order to avoid duplication

- Creating a new brand, or leveraging existing brands appropriate to the target audience
- Methods and approaches that are financially and practically sustainable

Summary/key points

The use of the NSMC Benchmark Criteria will help you ensure that you develop and deliver a targeted and customer-focused approach. The principles include:

- **Customer orientation** – having a strong **customer focus** from the start of and throughout a project
- **Insight** - building a clear picture of the people whose behaviours you are trying to change
- **Exchange** – understanding the pros and cons of the desired and negative active travel behaviours and how to tip the balance in favour of the positive ones
- **Competition** – identifying what’s competing for your target customers’ time and attention
- **Segmentation** - identifying different groups of people with distinct characteristics for which you can prioritise and develop targeted approaches/interventions
- **Behaviour** – being clear on the specific behaviours you need to change and setting appropriate behavioural objectives
- **Theory** – considering assumptions and potential scenarios to help inform and guide development
- **Methods mix** – using a mix of methods to bring about behaviour change not solely relying on one element such as raising awareness

These principles are a useful checklist to refer to whenever you are thinking about an intervention. Whether you are thinking about how to tackle an issue, developing an intervention or reviewing how a project went, consideration of these principles will help ensure you have a customer focus at all times.

A useful way of checking if you are applying these criteria/principles is to continually ask yourself:

- Is the project designed from the perspective of the target audience? Is it customer-focused?
- Are you clear what you want the target audience to do? Do you have clear behavioural goals and objectives?
- What mix of tactics – not just promotion – will be used to encourage desired behaviour change?
- Do the benefits of the behaviour outweigh the costs in the customer’s eye?

Links and References

- **When/where this fits in the SCSP timeline**
 - All the time, across all stages
- **Who needs to be involved**
 - The project team – planners, designers, providers, and customers involved in the development process
- **Link to other sections/associated tools/useful resources**

- [2.1.1 Behaviour change theory basics](#)
- [2.1.2 Behaviour change models](#)
- [2.2.2 Selecting and prioritising who to target](#)
- [2.3.3 Drawing out actionable insight](#)
- [2.4.1 The intervention mix](#)
- [2.4.2 The marketing mix](#)
- [2.4.3 A design health check](#)
- [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
- [Effective SCSP project design & delivery: Behaviour – theory and goals \(Video\)](#) (Password: SCSP)
- [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#) (Password: SCSP)
- [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)
- [Effective SCSP project design & delivery: A project ‘health’ check \(Video\)](#) (Password: SCSP)
- **Sources/References**
 - The NSMC (2016) Social Marketing Benchmark Criteria. The NSMC [online]. Available from: <http://www.thensmc.com/resource/social-marketing-benchmark-criteria> [Accessed 01/09/17]

1.3.2 Introduction to the Logical Planning Framework

Introduction

This section introduces the Logical Planning Framework (LPF) which is a key tool for use across all stages of an SCSP project: project planning, implementation and evaluation. The LPF explains what your project or programme is about, (e.g. to potential co-funders and supporters), helps you monitor progress and check things are working as planned, and evaluate impacts in order to demonstrate to others what outcomes have been achieved.

The Logical Planning Framework

The LPF is the overall plan for your project or programme. It should be no more than a page or two of text. It is useful to think of it as a table with linked columns or elements. Various templates exist to help you set out your LPF. The one recommended by Paths for All is made up of 8 elements (see Fig.1 below). By developing short content for each, you will build the blueprint for your project.

In your LPF, you should be able to succinctly describe:

1. **The overall purpose and goals of your programme or project** – a short statement of what you seek to achieve
2. **The target population for your project** – a brief summary of relevant insight into their existing travel behaviour. If appropriate, break down the target audience into segments defined by their behavioural characteristics.
3. **Behavioural goals and objectives** – be as specific as possible with regard to what you want each target audience segment to do.
4. **Details of the service, activities and tactics** – what the project will offer the target audience that you hope will achieve the desired behavioural objectives.
5. **Assumptions** – why you are confident that the project will deliver the desired behavioural objectives. Why do you think this – what evidence and theories do you have that indicate that it will work?
6. **Roles and resources** – what will be needed to deliver the activities in terms of funds and other support, including roles of stakeholders?
7. **Targets and outcomes** – what the project aims to deliver, and by when. E.g. the numbers of people to be covered, ways that their behaviour will change, how the audience will be impacted?
8. **Monitoring and evaluation methodology** – how you plan to track and monitor progress, check your core assumptions are working, the key indicators that will be used to measure outcomes, and how information on these will be collected.

Fig.1 Logical Planning Framework template

Overall Purpose and Goals of the Sustainable Transport Programme or SCSP Project – a statement of what it seeks to achieve					
Target population	Goals & Objectives	Service, activities & tactics	Assumptions	Roles and Resources	Targets and outcomes
A brief summary of the target audience & how (if appropriate) it breaks down into segments (segmentation based on behavioural characteristics)	Specific behavioural objectives – specified for each target audience segment.	The service, activities & tactics required to achieve desired behavioural objectives – linked to specific target audience segments where appropriate.	Set out the assumptions that underpin a confidence that the proposed activities will deliver desired behavioural objectives (i.e. a ‘theory of change’).	Resources required to deliver activities & how they will be deployed across the strategy. The roles that each stakeholder needs to play for successful implementation. The required funding/ match funding.	The outcomes we expect to see and measure. Expressed as Key Performance Indicators (KPIs). These can vary according to target audience segments. KPIs can be allocated across short/medium/ longer timescales.
Monitoring & evaluation methodology		How/what do you need to track whether planned activities are being rolled out as planned.	Reflect and check if core assumptions are working.	Monitoring resource delivery and the role of key players – e.g. are things working as intended.	Determine a range of practical methods that will gather information and data on agreed KPIs. Set out who needs to gather what, by when and how it will be presented.

It is important to set aside enough time to build the LPF in the early planning stages of the process, share and discuss it with others, and to revisit and revise it as and when appropriate.

You may need several revisions of the plan to take account of views and feedback from colleagues and stakeholders (e.g. to firm up objectives or develop plans for how outcomes can be measured and evaluation data collected). Time invested in careful planning will pay dividends as you progress a project.

A completed LPF will be useful to project implementation; as the basis of briefs for suppliers, and to ensure all partners know what they are expected to contribute.

Summary/key points

- Use the LPF template to set out your overall project plan
- It connects up what you want to achieve with each target audience, and how you will achieve objectives and measure impacts and outcomes
- It needs to be brief and succinct – e.g. one or two pages

- Involve colleagues and other key stakeholders in the developing your LPF, so that all partners have a unified understanding of the project

Links and References

- **When/where this fits in the SCSP timeline**
 - The LPF should be developed early in your pre-application planning (i.e. October-November), and revised when appropriate thereafter
- **Who needs to be involved**
 - The lead SCSP officer would normally co-ordinate the exercise, involving other stakeholders such as co-funders, communications and evaluation staff.
- **Link to other sections/associated tools/useful resources**
 - A LPF links closely to many sub-sections in Chapter 2 'Scoping and planning effective SCSP projects', in particular:
 - [2.1.1 Behaviour change theory basics](#)
 - [2.2.1 Behaviour change frameworks/tools](#)
 - [2.2.2 Selecting and prioritising who to target](#)
 - [2.3.2 Drawing out actionable insight](#)
 - [2.6.1 Important components of monitoring and evaluation](#)
 - [2.6.2 Setting targets and key performance indicators](#)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: The logical planning framework \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: Highland, Cycle to Health logical planning framework \(Video\)](#) (Password: SCSP)
- **Sources/References**
 - The NSMC (2016) Social Marketing Toolbox. The NSMC [online]. Available from: http://www.thensmc.com/sites/default/files/logical_framework_example.pdf [Accessed 01/09/17]

Chapter 2

Scoping and planning effective Smarter Choices Smarter Places projects

2.1 How to influence travel choices and behaviours

2.1.1 Behaviour change theory basics

Introduction

SCSP projects should be seeking to change behaviours of people in their target populations, so that more of these people make active and sustainable travel choices more often, and fewer make use of sedentary and unsustainable choices.

Behavioural change theory attempts to explain why a person might or might not change their behaviours. Theory cites environmental, personal, and behavioural characteristics as the major factors in determining behaviour.

Use of behavioural theory can help you develop and enhance understanding of your target customer(s) and how you can influence their active and sustainable travel behaviours. As such, this section introduces **exchange theory** and **competition**, and the **stages of change**.

Behaviour change theory/models

Exchange theory

It is useful to think of behavioural change in terms of a cost-benefit analysis from the target audience's perspective - in changing their behaviour, people will usually be giving something up in order to gain something else i.e. there is an exchange in value.

As such, it is important for interventions to emphasise the positive aspects of desirable behaviours and the negative aspects of problem behaviours. In the context of SCSP projects, this means considering problem and desired behaviours in relation to active and sustainable travel, including cycling and walking. Beliefs and attitudes are also important to consider as they impact on behaviour.

Therefore, in order to understand customers and the behaviour(s) you want to influence you need to get a handle on how people weigh up the pros and cons of changing a behaviour - what they perceive might be the attractions to them of walking, cycling or public transport and what is holding them back – what are the barriers and challenges. What you're trying to do is tip the balance that makes active/sustainable travel behaviour more attractive, and less active/non-sustainable travel behaviour less attractive.

An 'exchange' analysis (Fig. 2) - understanding what the person has to give in order to get the benefits proposed – requires:

- Clear analysis of the full cost to the consumer in achieving the proposed benefit (financial, physical, social, time spent, etc.)
- Analysis of the perceived/actual costs versus perceived/actual benefits of both the desired and current/undesired behaviour(s)
- Consideration and tailoring of appropriate incentives, recognition, reward, and disincentives according to specific audiences, based on what they value/see as benefits

Fig. 2: Incentives and barriers for the positive and problematic behaviours



It is important to know what the target audience perceives it is gaining and giving up if it adopts a desired behaviour. Ask how rewards/incentives can be increased and barriers/blocks reduced to improve the cost-benefit relationship.

For example: SCSP projects might be seeking to get participants to exchange the perceived convenience of a car journey for a slower but cheaper bus journey, or exchange enjoyable but costly gym membership for getting up earlier in the morning in order to be able to cycle to work.

Key questions to ask:

Cost-benefit analysis

- What are the costs of both the desired and problem behaviours in terms of money, inconvenience, risk, opinions of others, self-perception and so on?
- What are the benefits of the desired and problem behaviours in terms of financial savings, lifestyle, opinions of others and self-perception?
- Are there differences between the perceived short-term and long-term costs?
- Are there differences between the perceived short-term and long-term benefits?

Incentives/rewards and barriers analysis

- What is known about the factors that help maintain and reinforce the desired behaviour?
- What incentives and rewards help maintain and reinforce the positive behaviour?
- What barriers or blocks currently limit or restrict the desired behaviour?
- What is known about the factors that help maintain and reinforce the problem behaviour?
- What incentives and rewards help maintain and reinforce the problematic behaviour?
- What barriers or blocks limit or restrict the problem behaviour?

Understanding how people have managed to successfully change previous behaviour and what supported this:

- What worked for them, and why?
- What were the incentives/rewards that worked? What benefits did they get from making the change?
- What barriers or blocks had to be addressed and overcome?
- How were barriers or blocks reduced or eliminated? Or how might they be for others?

Developing an action plan

- How can existing incentives for the desired behaviour be enhanced and strengthened?
- What additional incentives might be developed?
- How might incentives for the problem behaviour be removed or reduced?
- How can barriers or blocks to negative behaviour be enhanced and strengthened?
- What additional barriers or blocks might be developed to help limit or restrict the problem behaviour?

Competition

Competition are factors that distract or get in the way of the positive behaviours that you are trying to encourage. Thinking about the competition helps to focus attention on the target audience and the many reasons why they may find it difficult to adopt or sustain positive active and sustainable travel behaviours and reject negative behaviours. It will identify potential challenges and help develop effective social marketing strategies for dealing with the competition. It also helps us to set realistic objectives.

Competitor analysis requires that all actual and potential competitors are identified, the nature of the competition is assessed and strategies are developed for dealing with each

Think about direct and indirect competition. For SCSP projects direct competition could be someone's preference for driving their car to work versus indirect competition, which could be the need to get somewhere quickly. For children it could be the preference to watch videos/ play games rather than go on a bike trip.

type of competition. You're trying to get them excited, enthused, attracted into doing something differently, but what's getting in the way of that? **What's competing for their**

time and attention?

You need to:

- Look for strategies that aim to minimise potential impact of competition by considering positive and problematic external influences & influencers
- Make sure both internal factors (psychological, pleasure, desire, risk taking etc.) and external factors are considered and addressed

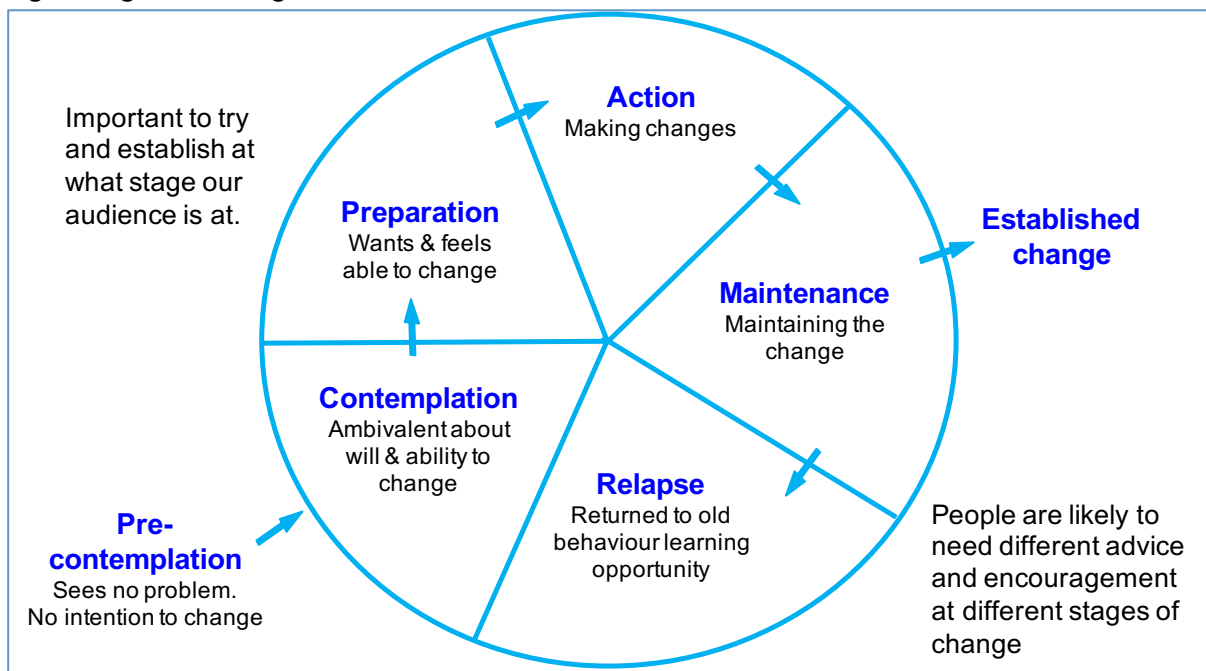
The stages of change theory

The stages of change theory identifies different stages that people can go through when adopting different behaviours. It views behaviour as a non-linear process (Fig. 3) rather than a one-off event. It recognises that there are different levels of motivation and readiness to change. The different stages of change identified are:

- 1) **Pre-contemplation** – they are unaware, not currently considering or intending to adopt a certain behaviour e.g. a person is happy with their current travel choices and unaware that other options exist
- 2) **Contemplation** – they have become aware and are beginning to understand and consider adopting the given behaviour, and may be prepared to seek more information e.g. a person has heard that there is a bus service, but does not know details of its route or timetable

- 3) **Preparation** – they are actively considering and beginning to make commitment to adopting a behaviour e.g. a person investigates bus timetable and finds the service could be convenient for their journeys.
- 4) **Action** – they undertake or start to undertake a given behaviour e.g. a person tries using the bus.
- 5) **Maintenance** – they sustain and consolidate the given behaviour. There is potential for ‘relapse’ where they fall back to previous behaviour e.g. bus use continues, but may cease if external factors change (such as changing job).
- 6) **Relapse** – they revert back to their original behaviour

Fig.3 Stages of change model



SCSP projects must enable people to take action if their actual travel choices are to change. Providing information on new transport choices, for example, may help people move from the Contemplation stage to Preparation, but may not be enough in its own right to move people to Action. Consider whether you are happy with such an outcome from your SCSP project, or whether other activity is also required.

Note that not everyone moves through stages at same rate/people stay on different stages for different lengths of time. The main factors that play a part here are:

- a) **Varying levels of motivation** - the balance of positives and negatives of a behaviour, depending on the consequences will be different for different people/groups. This can affect motivation
- b) **Self-efficacy** – the level of confidence in their ability and capability to undertake the behaviour will also vary between people/groups. E.g. someone unsure whether they are fit enough or capable of cycling a journey

Questions to ask:

- Where/who is our focus? **Commuters...**

- What do we want them to think/do? *The possibility of cycling to work...*
- What might motivate them to change? *Improved fitness, shorter journey time...*
- Why will they move from one stage to the next? *Promotion, free trial, bike lend/buy scheme...*
- What might 'pull' or 'nudge' them to change? *Colleagues doing it, employer led trail day/week*
- What might hold them back? *Lack of equipment, weather*
- What practical things might YOU be able to do to help? *Support employers with promotion, trial equipment, facilitation...*
- What could others do? *Add resources and encouragement...*
- How will we know if what we are doing is working? *Build in monitoring & evaluation from start – have pilot participant sign-up to pre and post survey...*

This theory is useful to use when segmenting audiences and tailoring interventions for different needs.

Strategies that can help people make and maintain change:

1. Get the Facts - increasing awareness via information, education, and personal feedback about the active/sustainable travel behaviour.
2. Pay Attention to Feelings - feeling fear, anxiety, or worry because of the behaviour, or feeling inspiration and hope when they hear about how people are able to change to healthy behaviours.
3. Create a New Self-image - realising that the active and sustainable travel behaviour is an important part of who they are and want to be.
4. Notice Their Effect on Others - realising how their behaviour affects others and how they could have positive effects by changing.
5. Notice Public Support - realising that society is more supportive of active and sustainable travel behaviours.
6. Make a Commitment believing in one's ability to change and making commitments and re-commitments to act on that belief.
7. Get Support - finding people who are supportive of their change.
8. Use Substitutes - substituting inactive/unsustainable ways of travel for better ways.
9. Use Rewards - increasing the rewards that come from positive behaviour and reducing those that come from negative behaviour.
10. Manage their Environment - using reminders and cues that encourage positive behaviour as substitutes for those that encourage the negative behaviour.

Summary/key points

- Behavioural change theory attempts to explain why behaviours change. There are many theories to draw from, particularly useful ones include exchange theory and the stages of change
- Think about the pros and cons of both the desired and problem behaviours and how you can incentivise or disincentivise them (Exchange theory)
- Consider what competes (directly and indirectly) against the desired behaviours (Competition)

- It is useful to recognise that some people go through a number of stages when adopting a behaviour where levels of motivation and readiness to change vary between stages. Effective SCSP projects will help people move between the stages that are relevant to them

Links and References

- **When/where this fits in the SCSP timeline**
 - In the planning and development stages, typically October to January
- **Who needs to be involved**
 - The project team – planners, designers, providers, and customers involved in any planning/co-design/co-development
- **Link to other sections/associated tools/useful resources**
 - [2.1.2 Behaviour change models](#)
 - [2.1.3 Travel behaviour change insight](#)
 - [2.3.3 Drawing out actionable insight](#)
 - [Effective SCSP project design & delivery: Behaviour – theory and goals \(Video\)](#)
(Password: SCSP)
- **Sources/References**
 - The NSMC (2016) Social Marketing Toolbox. The NSMC [online]. Available from: <http://www.thensmc.com/content/analysing-costs-benefits-and-competition-1> [Accessed 01/09/17]
 - Prochaska J. O., Diclemente C. C. (1983). Stages and processes of self-change in smoking: Toward an integrative model of change. *Journal of Consulting and Clinical Psychology*, 51, 390–395.
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2.1.2 Behaviour change frameworks/tools

Introduction

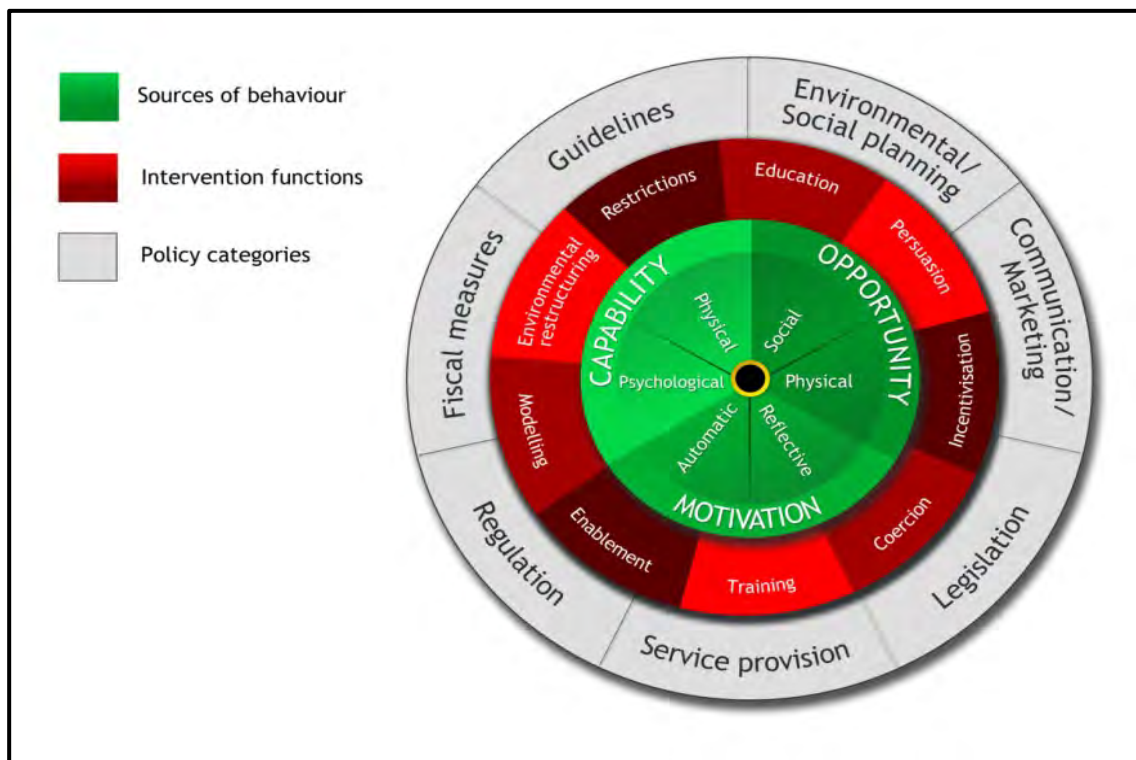
In addition to the many behaviour change theories, a growing number of behaviour change frameworks and tools have been developed as practical tools to design appropriate behaviour change interventions. We have already introduced you to the principles of social marketing; this section introduces you to four more useful tools. Note, in this section we have only presented an overview of each tool – for full details for each use the links/references detailed in the Links and References.

Behaviour change frameworks and tools

The behaviour change wheel

The Behaviour Change Wheel (BCW) (Fig.4) is a systematic framework for characterising and designing behaviour change interventions and strategies.

Fig.4 The Behaviour Change Wheel



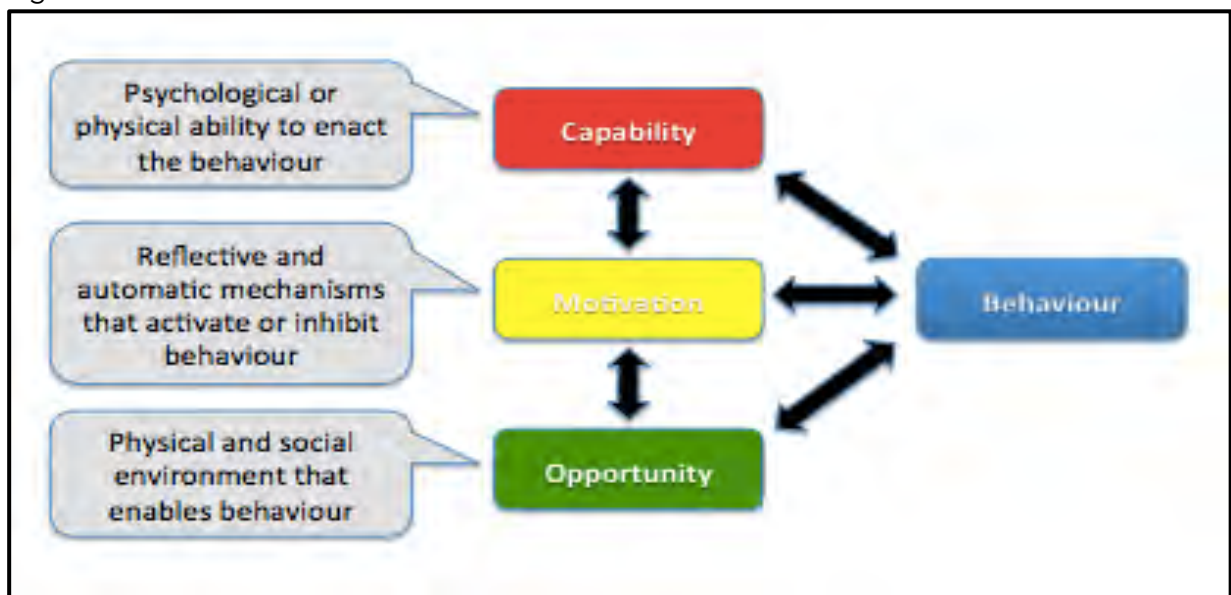
It consists of three layers: the hub focusing on the key components or sources of behaviour; a layer of 9 functions that can influence behaviour; and an outer layer that identifies 7 types of policy.

The starting point for using this method is consideration of the central COM-B model (Fig.5). This model is based on the premise that for any behaviour to occur there are three interrelated components:

1. People must have the '**capability**' to do it;
2. There must be the '**opportunity**' for the behaviour to occur; and
3. There must be sufficient '**motivation**'

- **Capability** is defined as the individual's *psychological* (having the necessary knowledge and skills) and *physical* (skills, strength or stamina) capacity to engage in the activity concerned. For typical SCSP projects, capability is likely to include issues such as whether people are aware that there are alternative travel options available to them (psychological) and whether they are able to cycle far enough to get to their destination (physical).
- **Motivation** is defined as all those brain processes that energize and direct behaviour, not just goals and conscious decision-making. For SCSP projects, this will include individuals' willingness to take time to reconsider their travel choices, or whether they feel motivated to try a new choice that, for example, includes physical activity.
- **Opportunity** is defined as all the factors that lie outside the individual that make the behaviour possible or prompt it. This can be physical in terms of what the environment allows and facilitates in terms of time, triggers, resources, locations and barriers, or 'social' including interpersonal influences, social cues and cultural norms. For transport choices, these opportunities include constraints about journeys (e.g. arrival/departure times) or social norms such as the aspiration to buy a car.

Fig.5 COM-B model



Having established the COM-B factors necessary for performing a particular behaviour, and those currently in play, appropriate intervention functions and policies (Fig.6) can then be identified.

Fig.6 COM-B intervention functions and policies

Intervention functions	Intervention policies
<ul style="list-style-type: none"> • Education: Increasing knowledge or understanding • Persuasion: Using communication to induce positive or negative feelings or stimulate action • Incentivisation: Creating expectation of reward • Coercion: Creating expectation of punishment 	<ul style="list-style-type: none"> • Communication/marketing: Using print, electronic, telephonic or broadcast media • Guidelines: Creating documents that recommend or mandate practice. This includes all changes

<p>or cost</p> <ul style="list-style-type: none"> • Training: Imparting skills • Restriction: Using rules to reduce the opportunity to engage in the target behaviour (or to increase the target behaviour by reducing the opportunity to engage in competing behaviours) • Environmental restructuring: Changing the physical or social context • Modelling: Providing an example for people to aspire to or imitate • Enablement: Increasing means/reducing barriers to increase capability or opportunity 	<p>to service provision</p> <ul style="list-style-type: none"> • Fiscal: Using the tax system to reduce or increase the financial cost • Regulation: Establishing rules or principles of behaviour or practice • Legislation: Making or changing laws • Environmental/social planning: Designing and/or controlling the physical or social environment • Service provision: Delivering a service
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The ISM tool

ISM (Fig.7) is a practical tool that is based on theory and evidence that shows how three different contexts – the Individual, Social and Material – influence people’s behaviours. The key principle of ISM is that interventions should take account of these influences/multiple contexts in order to achieve substantive and long-lasting change.

Fig.7 Factors that influence behaviour in the individual, social and material contexts ('The ISM model')



The Individual Context - factors held by the individual that affect the choices and the behaviours he or she undertakes. These include an individual’s values, attitudes and skills, as well as the calculations he/she makes before acting, including personal evaluations of costs and benefits.

The Social Context - factors that exist beyond the individual in the social realm, yet shape his or her behaviours. These influences include understandings that are shared amongst groups, such as social norms and the meanings attached to particular activities, as well as people’s networks and relationships, and the institutions that influence how groups of individuals behave.

The Material Context - factors that are ‘out there’ in the environment and wider world, which both constrain and shape behaviour. These influences include existing ‘hard’ infrastructures, technologies and regulations, as well as other ‘softer’ influences such as time and the schedules of everyday life.

The tool can be used to map the behavioural influences to the target customer(s) and then determine where there are gaps or areas of improvement i.e. direct the development process.

MINDSPACE

“MINDSPACE: Influencing behaviour through public policy” was published by the Institute for Government and the Cabinet Office. The report explores how behaviour change theory and behavioural economics can help meet current policy challenges, such as how to: reduce crime, tackle obesity, and ensure environmental sustainability. As well as giving an overview of key behavioural theory it acts as a useful checklist/tool that can be used when making policy and developing active and sustainable travel interventions/SCSP projects.

MINDSPACE is a simple mnemonic that sets out nine of the most robust (non-coercive) influences on behaviour:

Messenger	We are heavily influenced by <u>who</u> communicates information
Incentives	Our responses to incentives are shaped by predictable mental shortcuts such as strongly avoiding losses
Norms	We are strongly influenced by what others do
Defaults	We ‘go with the flow’ of pre-set options
Salience	Our attention is drawn to what is novel and might seem relevant to us
Priming	Our acts are often influenced by sub-conscious cues
Affect	Our emotional associations can powerfully shape our actions
Commitment	We seek to be consistent with our public promises and reciprocate acts
Ego	We act in ways that make us feel better about ourselves

EAST

Developed by the Behavioural Insights Team, the EAST framework is another simple mnemonic- based set of simple principles to encourage a behaviour – make it Easy, Atttractive, Social and Timely (EAST).

Make it **Easy**

- People have a strong tendency to go with the default or pre-set option, since it is easy to do so. Making an option the default makes it more likely to be adopted.
- The effort required to perform an action often puts people off. Reducing the effort required can increase uptake or response rates.
- Simplify messages. Making the message clear often results in a significant increase in response rates to communications.

Make it **Attractive**

- Attract attention. People are more likely to do something that their attention is drawn towards. Ways of doing this include the use of images, colour or personalisation.
- Design rewards and sanctions for maximum effect.

Make it **Social**

- Show that most people perform the desired behaviour. Describing what most people do in a particular situation encourages others to do the same but be wary of inadvertently reinforcing a problematic behaviour by emphasising its high prevalence.
- Use the power of networks. People are embedded in a network of social relationships - those we come into contact with shape our actions.
- Encourage people to make a commitment to others. The social nature of these commitments is often crucial.

Make it **Timely**

- Prompt people when they are likely to be most receptive. The same offer made at different times can have drastically different levels of success. Behaviour is generally easier to change when habits are already disrupted, such as around major life events.
- Consider the immediate costs and benefits. We are more influenced by costs and benefits that take effect immediately than those delivered later.
- Help people plan their response to events. There is a substantial gap between intentions and actual behaviour. A proven solution is to prompt people to identify the barriers to action, and develop a specific plan to address them.

Summary/key points

There are a number of very useful tools to help you establish what is influencing your target behaviours and how to change them. The ones we have highlighted include:

- The Behaviour Change Wheel
- The ISM tool
- MINDSPACE
- The EAST framework

Links and References

- **When/where this fits in the SCSP timeline**
 - In the planning and development stages typically October to January
- **Who needs to be involved**

- The project team – planners, designers, providers, and customers involved in any planning and development
- **Link to other sections/associated tools/useful resources**
 - [2.1.2 Behaviour change models](#)
 - [2.1.3 Travel behaviour change insight](#)
 - [2.3.3 Drawing out actionable insight](#)
 - [2.4.1 The Intervention Mix](#)
 - [Effective SCSP project design & delivery: Behaviour – theory and goals \(Video\)](#)
(Password: SCSP)
- **Sources/References**
 - Michie, S, Atkins, & L, West, R. (2014) *The Behaviour Change Wheel: A guide to designing interventions*. Great Britain: Silverback Publishing.
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 - Behavioural Insights Team (2014). EAST: Four simple ways of applying behavioural insights. The Behavioural Insights team [online]. Available from: <http://www.behaviouralinsights.co.uk/publications/east-four-simple-ways-to-apply-behavioural-insights/> [Accessed 01/09/17]

2.1.3 Travel behaviour change insight

Introduction

Understanding the needs and aspirations of the target market is essential if a project is to change travel behaviours. To design an effective project, insight needs to be gathered in order to help you understand your market.

This section helps you identify and make use of likely sources of such insight, in order to increase perceived benefits or reduced perceived barriers to change. It also provides an overview of some insights that are generally applicable to smarter choices projects that you can draw on in planning and developing your own projects.

Insight

Insight into the target audience for any behaviour change project should be sought in order to understand:

- What changes in travel choices are the target people likely to be able to make?
- What are their lifestyle needs and aspirations, and how do these relate to current or potential new travel choices?
- Which mechanisms are likely to be effective at communicating with them?

Both quantitative and qualitative insight can help you design your project. Examples of quantitative insight, and how they could shape an SCSP project, include:

- Only 5% of the workforce car share: *there might well be potential to deliver a significant increase in this proportion*
- Half of all staff have a direct bus route from home: *if bus usage is low, increasing awareness of services may be effective*
- Two-thirds of the pupils use free school transport: *if the proportion travelling sustainably is already high, the potential to encourage many more to do so might be small*

Examples of qualitative insight, and how they could shape an SCSP project, include:

- “It is too dangerous for my children to cycle to school”: *check the accident record and investigate further. If it is bad, then promoting cycling to school might not be appropriate or credible, but if not then work to change this perception might be effective*
- “Driving is the only way I can get here”: *investigate whether this is the case. If so, then do not try to promote alternatives for this journey, but identify whether there are other journeys for which alternatives are appropriate*
- “Now I’ve got my car I want to use it”: *help the person understand the operating cost of a car, and highlight that whilst car use will remain appropriate for some journeys, for some others sustainable choices could be cheaper/more convenient/more pleasant.*
- “The buses never run to time”: *investigate the service reliability. If it is poor, then promoting public transport might be of limited use, but if it is good then work to overcome this perception*
- “Everyone reads the village newsletter”: *this could be an effective communication mechanism*

- “There are already lots of environmental initiatives underway here”: *care should be taken in project design to either integrate the SCSP work with existing initiatives, or if those existing initiatives are already promoting sustainable travel, then it may be better to focus SCSP work elsewhere*

In every case, these examples will help you to shape your work, steering you towards particular interventions, or away from others.

Much insight can be drawn from standard, existing sources: previous surveys and research, as well as some of the understanding of the typical characteristics of Scotland’s communities.

In this latter regard, much useful insight is widely known within the industry. Examples include:

- Many people in Scotland, especially those in lower-income households, do aspire to be able to drive, or to drive more
- Almost all children’s travel choices are constrained, to a greater or lesser extent, by their parents’ perceptions of road- or personal-safety risks
- Young children almost all want to scoot and cycle, but there is a significant decline in interest at around the time of the transition between primary and secondary school
- Many people, particularly but not exclusively women and older people, have their travel choices significantly constrained by personal security concerns, especially if travelling alone and after dark
- Many people’s choices are constrained by their unfamiliarity with certain situations, feeling embarrassed that they might not know how to pay on a bus or worried that they don’t know how to fix a bike if they have a problem *en route*, or with their own abilities, such as the fear of falling whilst walking

Barriers and opportunities to change

Our experience has provided us with some key principles and highlighted some main barriers to behaviour change. We are telling you about them here to share our learnings.

Changing an individual’s travel choices requires for them to be convinced that:

- The real and/or perceived barriers to the active and sustainable travel choice are reduced; and/or
- The real and/or perceived benefits of the active and sustainable travel choice are increased.

Understanding barriers

Research has found that people who would like to travel actively more but fail to do so due to:

- Concerns about the physical environment, especially with regard to safety when walking or cycling
- The difficulty of fitting walking and cycling into complex household routines (especially with young children)
- The perception that walking and cycling are in some ways abnormal things to do so

Responses from individuals engaged in sustainable travel promotion projects typically identify barriers to uptake of sustainable travel choices such as:

- It's not safe (to cycle, to walk after dark, etc.)
- It's too far (to walk/cycle)
- I need to escort other people (who can't travel sustainably) or take more than I can carry
- It takes too long
- I can't afford a bike/public transport ticket
- The weather's too bad

Some of these barriers are real (some journeys cannot be completed by sustainable modes) but many are perceived. These perceived barriers may be able to be reduced by careful targeting of information, advice and encouragement to try a new choice. Many can be overcome by encouraging people to think more broadly about their travel (can they join up trips in one day? Do they need to take so much with them? etc.).

This change can be assisted if participants are encouraged to recognise that some of these perceived barriers happen only sometimes (such as bad weather) and some are non-permanent (such as children being too young to scoot to school). Projects should seek to embed the potential for change in the longer-term, even if a participant is not ready or able to change their travel choices today.

Social norms are incredibly powerful in influencing behavioural choices; most people's aspirations are determined in part by the choices made by other members of their community and the people they aspire to be like. Examples of social norms influencing travel choices include:

- "My car indicates status; people may think I've fallen on hard times if I don't arrive in the latest model"
- "I wouldn't want to use the bus; it's only for pensioners"
- "I couldn't walk that far; to do so I would need to wear comfy shoes, and they just wouldn't look right when I arrive".

It is essential that you do not treat perceived barriers to active and sustainable travel choices, or the social norms that surround them, as trivial; to the individual participant the barriers are likely to be important, and their views must be respected.

Seek to gather insight into perceptions and norms during the project design process in order to help tailor your projects to reduce barriers to change.

Understanding opportunities

Findings from travel behaviour change projects over the last decade or so suggest that people are more likely to respond to benefits that are:

- Short-term, not long-term (so "being active will help your children sleep well tonight" is typically more effective than "ensuring your children are active will reduce their risk of health problems in later life")

- Internal to the individual, not external to society as a whole (so “using public transport will save you money” is typically more effective than “using public transport will reduce carbon emissions”)

We have typically found that, in order to encourage people to adopt more active/sustainable travel choices:

More effective messages:

- Save you money
- Getting more active. Active travel can help someone who wants to lose a little weight, someone who wants to get a bit fitter, someone who likes being active, but struggles to find the time
- Are fun/enjoyable/sociable activities
- Will make you feel better (mental wellbeing is improved)

Less effective messages:

- Will help you to ‘do your bit’ (for congestion, or the environment)
- Will improve long-term health

But these are general lessons, and may not be relevant for the specific target audience for your project. Insight will help you to understand your audience better.

Gathering insight

SCSP project designers rarely have the opportunity to undertake the extensive qualitative and quantitative research throughout the target population that would be ideal to gather all this insight. But much useful information is readily available and should be sought during the project design process.

Primary research

Whether or not pre-existing insight is comprehensive, gathering at least some modest additional insight is likely to add value to an SCSP project.

Some large-scale projects might justify collection of extensive new data on travel patterns and attitudes amongst the target population. However, the cost and timescale implications of survey processes mean that this is unlikely to be appropriate in many cases.

More guidance on primary research methods is available in section 2.3.2. But small-scale quantitative research into current travel habits can be useful, especially if a large proportion of the target population can be communicated with easily (e.g. hands-up surveys in schools, or an on-line survey that can be emailed to all staff working at a site).

Engaging with key stakeholders at this stage will provide useful insight for almost all SCSP projects, as many will have a good understanding of the communities in which they work or represent. Typically, relevant stakeholders will include:

- Leaders of community groups
- Staff of other projects or initiatives that share similar objectives
- People already working with sustainable and active travel choices (public transport operators, cycle shops, walks leaders, lobby groups, etc.).

Key questions to ask to gain insight from stakeholders include:

- What previous surveys or data are available?
- How have people responded to previous initiatives to change their travel or other related choices?
- What are the best mechanisms to communicate with members of this community?
- How will local people react to this project?
- Are there any other initiatives underway that the SCSP project should try to integrate with?
- Who locally might help support a sustainable travel project? Who might object to it and why, and how can their concerns be reduced in order that they don't object?

Summary/key points

- To be effective, SCSP projects must understand the needs and aspirations of their target markets; gathering insight will help
- Both qualitative and quantitative information can provide helpful insight
- Useful insight is available from previous smarter choices projects and from published datasets, though collection of new insight is likely to be required in order to understand the specific needs of target communities. Engaging with stakeholders can be a particularly cost-effective mechanism for gathering new insight

Links and References

- **When/where this fits in the SCSP timeline**
 - September/October
- **Who needs to be involved**
 - Local stakeholders who understand the needs and aspirations of target communications
- **Link to other sections/associated tools/useful resources**
 - [2.2.2 - Selecting and prioritising who to target](#)
 - [2.2.3 - Fitting an SCSP project into existing projects, opportunities and constraints](#)
 - [2.3.1 - Drawing on existing insight](#)
 - [2.3.2 - Primary research](#)
 - [2.3.3 - Drawing out actionable insights](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#) (Password: SCSP)
- **Sources/References**
 - Pooley et al (2011) Understanding walking and cycling: Summary of key findings and recommendations'. Walking for Health [online]. Available from: https://www.walkingforhealth.org.uk/sites/default/files/Understanding_Walking_%26_Cycling_Report_WEB.pdf [Accessed 01/09/17]
 - Living Streets (2011) Breaking down the barriers: The Olympian hurdles faced by children in walking to school. Living Streets [online]. Available from:

<https://www.livingstreets.org.uk/media/1398/breakingdownthebarriers.pdf>

[Accessed 01/09/17]

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- Glasgow Centre for Population Health Qualitative research into active travel in Glasgow. Glasgow Centre for Population Health [online]. Available from: http://www.gcph.co.uk/assets/0000/0431/Active_Travel_in_Glasgow_Final.pdf [Accessed 01/09/17]

2.2 Determining and defining your project aims and objectives

2.2.1 Selecting and prioritising who to target

Introduction

SCSP projects cannot hope to encourage everyone in a local authority area to adopt every type of sustainable and active travel choice. In order to target and develop appropriate and effective interventions, segmentation of the whole potential market into manageable portions is essential. This section introduces you to the segmentation process and its role in selecting and prioritising who to target.

Segmentation

Why is segmentation important?

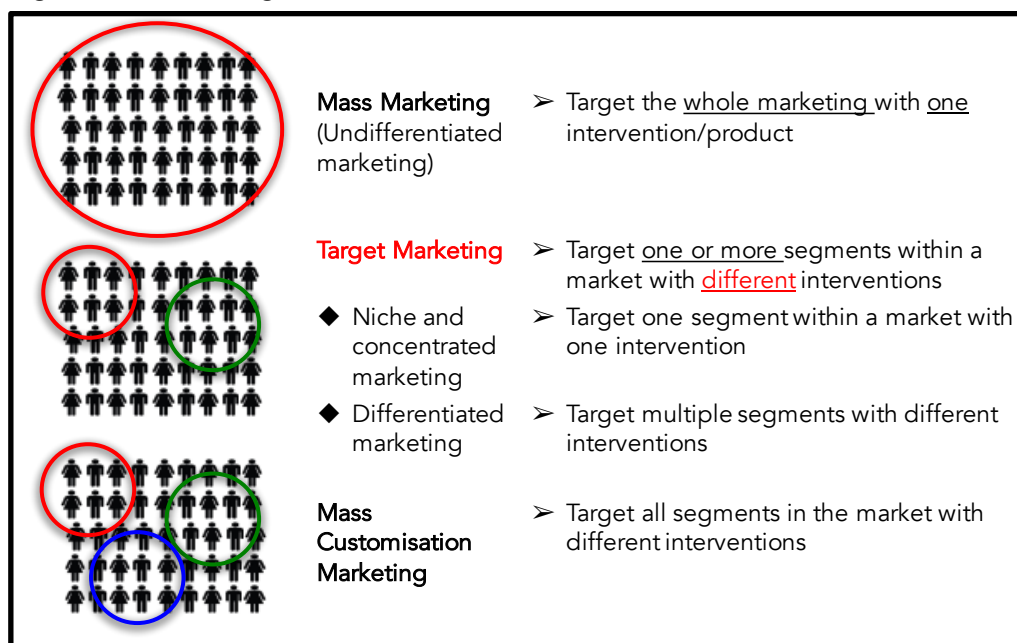
Segmentation is important because it will help you to understand your market. It will help you:

- Identify and prioritise target groups,
- Develop specific/tailored customer-focussed interventions, and
- Communicate appropriately.



Consideration of these things will also help you determine and shape your strategy. For instance, do you target a specific group or groups with different interventions, or is a mass market approach more appropriate and feasible? The amount of available budget is always a factor, but targeted approaches are usually the most effective. See Fig.8 below.

Fig.8 Market Strategies



What is a segment?

A segment is set of potential customers who share the same characteristics i.e.:

- Who have similar needs
- Who reference each other when buying/engaging/consuming
- Are alike in the way they:
 - Perceive value – value the same benefits. For example, value the environmental benefits of cycling to work
 - View products and services
 - Purchase products and services

The characteristics of good segmentation are that:

- ✓ Segments must be **identifiable** – easy to place customers in, easy to explain to colleagues, easy to measure
- ✓ Segments must be **viable** – be of a size and value that deserves your attention, be accessible – have a cost-effective way of reaching them
- ✓ Segments must be **distinctive** – have characteristics/attributes that set them apart from others
- ✓ And segmentation will **need refreshing** - things change over time

How do you determine your segments?

To determine segments, you need to draw on your insight, exchange and competition analysis together (see [sections 2.1](#) and [2.3](#)).

In order to identify and define how people group together it is important that you consider a range of characteristics. These (see Fig.9 below) include:

- **Demographics (Socio & Geo)** – ‘people’ characteristics such as age, gender, ethnicity, where they live, income etc.

Highlands Council, [Cycle to Health](#) target segment:

People living in the Highlands, aged 18 years and over, who are experiencing low self-esteem, feelings of isolation, lacking in confidence or motivation. The project was initially open only to women, but was later expanded to men too.

- **Activities & Lifestyle**

characteristics – the way people live their lives, the activities they do – what their hobbies and pastimes are? How they spend their money? etc.

- **Psychographics** - attitudes, beliefs, aspirations, and other psychological criteria including personal values
- **Behavioural characteristics** – how people behave currently and what specifically influences this behaviour

Perth & Kinross Council, [Perth on the Go](#) project objectives:

Car drivers resident in the Scone and Bridgend areas of Perth, who currently drive through the most congested and polluted areas of Perth City centre.

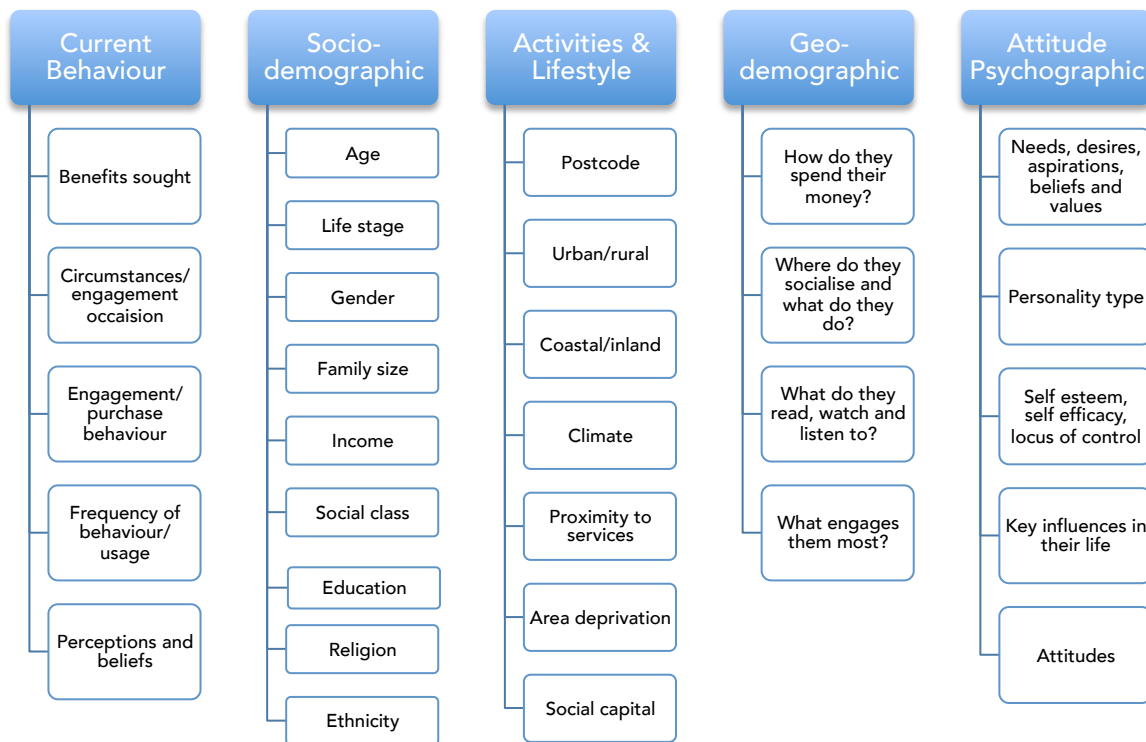
(The worst pollution hotspots were on Atholl Street and at Bridgend, and traffic data showed that much of the traffic in the hotspots emanated in those communities. Furthermore, many Scone and Bridgend residents had reasonable alternatives available for their journeys, notably the newly-introduced Stagecoach Gold Service 7 hybrid bus.)

Segments in typical SCSP projects might be people that:

- Live in the same neighbourhood
- Often travel to the same location (workplace, school, etc.)
- Have similar needs (e.g. the need for support to enable them to travel independently)
- Have similar family structure (e.g. are parents of young children)

Although having demographic information – men, women, age, social class – can be particularly useful for segmentation (and often used as the only basis for segmentation), **a behavioural perspective must be considered**. You must consider how audiences cluster, breakdown and segment according to behaviours.

Fig.9 – An overview of the bases for segmenting



Selecting your target segments

Once you have a clear picture of your market segments you can then select who you want to target. The basis on which you select a segment or segments to target will vary and depend on a range of factors including the nature of the planned behaviour change. For instance:

- Total number of people in the segment
- Accessibility of the target audience
- How persuadable is the target audience?
- Their potential to influence others
- Resources required to meet needs of target
- Equity – social equality considerations

Summary/key points

- Segmentation helps you identify and distinguish between the different groups and how to target them.
- In order to be valid, segments/groups need to be identifiable, viable, distinctive and refreshed over time.
- You can identify a segment on the basis of a range of demographic, lifestyle and physiographic characteristics BUT **a behavioural perspective must be considered.**

Links and References

- **When/where this fits in the SCSP timeline**
 - Identifying, selecting and defining target groups/segments is core part of the pre-application planning phase (October-November).
- **Who needs to be involved**
 - The project designer and team, taking account of views of key stakeholders.
- **Link to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.1 - How to influence travel choices and behaviours](#)
 - [2.2.2 – Setting clear objectives – key considerations](#)
 - [2.3 - Understanding your customers](#)
 - [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: The logical planning framework \(Video\)](#) (Password: SCSP)
- **Sources/References**
 - Pickton D, Broderick A. (2005) *Integrated Marketing Communications*. 2nd ed. Harlow: Prentice Hall.

2.2.2 Setting clear objectives - key considerations

Introduction

This section considers the importance of being clear on what you want to do – what do you want target audiences to do as a result of the project or programme that you are introducing?

Setting clear objectives

Setting and finalising your objectives may take some iterations – although you will need a starting point in terms of who you want to target and what you want them to do. This may change or need refining during planning, as you gather more insight and prioritise who to target.

Highlands Council, Cycle to Health project objectives:

- “To improve participants’ mental and physical wellbeing
- To provide them with useful skills (of confident cycling)”

Most projects should be looking to influence and achieve measurable change in people’s sustainable travel behaviour – e.g. how often they cycle at weekends, how frequently they walk to work and so on. It helps to think about your audience’s current behaviour and how you want them to change as a result of your project.

Setting behavioural objectives for your audience is a key component of the Logical Planning Framework (LPF). In defining these objectives, draw on available insight into your audiences’ behaviours. You should have a clear picture of how the project will encourage them to adopt the desired behaviours.

Perth & Kinross Council, Perth on the Go project objectives:

“For car drivers to use less polluting travel options (walk, cycle, public transport, car share) for journeys on which it is appropriate for them to do so, in order to help reduce air pollution levels at key hotspots.”

If your audience breaks down into distinct groups, try and set behavioural objectives for each segment on the basis of their travel

behaviour. As a final check for robustness, ask if these behavioural objectives are SMART – i.e. are they Specific, Measurable, Achievable, Relevant/Realistic and Time-bound?

- SPECIFIC
Objectives should not be open to different interpretations. They should be explicit about what will be done, where it will be done and who will be involved. They should also be stated so that everyone knows what is to be achieved.
- MEASURABLE
They must relate to behaviours and attitudes that can be measured in some way, such as statistics, observation or research.
- ACHIEVABLE
Although good objectives should stretch our capabilities, they should be achievable within the available resources. They should also be agreed by relevant stakeholders.

- RELEVANT
Will the objectives lead to the desired results? Also, are they realistic – (similar to achievable).
- TIME-BOUND
A completion date, which accords with SCSP funding requirements, should be specified.

Note, that the more precise you can be about your objectives, the better and more precise you can be about planning on how to achieve them.

Also, without clear objectives that meet the above SMART test, you may not be able to properly measure and demonstrate what the project has achieved. In turn, this can make it more difficult to argue convincingly for support to enable project continuation or wider roll out.

Summary/key points

- A key element of your LPF is to have clear behavioural objectives for each audience segment.
- Draw on available research and insight when setting behavioural objectives for your audience.
- You need SMART behavioural objectives in order to properly measure the impact of the project.
- Regularly review your objectives and keep a record of changes and why these were necessary.

Links and References

- **When/where this fits in the SCSP timeline**
 - Setting clear objectives is part of the pre-application planning phase (October-November) and needs to be completed in advance of project submission.
- **Who needs to be involved**
 - The project designer, taking account of views of key stakeholder, including those who will responsible for monitoring and evaluation.
- **Link to other sections/associated tools/useful resources**
 - Setting clear objectives links closely with the Logical Planning Framework
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.6.1 - Important components of monitoring and evaluation](#)
 - [2.6.2. Setting targets and key performance indicators](#)
 - [Effective SCSP project design & delivery: The logical planning framework \(Video\)](#) (Password: SCSP)
- **Sources/References**
 - The NSMC (2016) Social Marketing Toolbox. The NSMC [online]. Available from: <http://www.thensmc.com/content/define-behavioural-goals-and-objectives-1>
[Accessed 01/09/17]

2.2.3 Fitting an SCSP project into existing projects, opportunities and constraints

Introduction

SCSP projects are not undertaken in isolation; other initiatives or external opportunities and constraints are likely to influence which projects can or should be funded using SCSP or how they should be delivered.

This section provides guidance on how to integrate an SCSP project with these external factors.

Fitting an SCSP project into existing work

The preceding sections have provided an overview of how to set objectives for an SCSP project and how to define a target audience. However, you are likely to need to take a range of external factors into account, which may affect objectives or audiences. The points below provide a checklist of likely factors. Engaging with potential project partners and stakeholders during the SCSP planning stage is likely to provide insight in relation to each of these.

Other recent or on-going projects

You should consider whether your target audience is also the target of other initiatives; of recent projects, those that are on-going, or planned. Relevant initiatives may focus on transport choices specifically, or on related topics such as environmental or health improvements.

Factors to consider when fitting SCSP projects into existing work:

- Other recent or on-going projects
- Availability of match funding
- Quality of options to be promoted
- Likely acceptability
- Deliverability

Knowledge of these other initiatives might steer the SCSP project towards investing more in that location, or less. Examples include:

- SCSP might be able to be used effectively to promote a planned active travel infrastructure enhancement or new public transport service
- There may be on-going work in the target community which is also seeking to influence behaviours, e.g. for health or environmental benefits. This work might provide a good opportunity for use of SCSP funds (if transport messages can be efficiently added to that other work). However, it might make it inappropriate to try to run a smarter choices project too (if there is a risk of potential confusion or initiative overload)

Understanding these opportunities and constraints should be an objective of the insight-gathering process.

Availability of match funding

SCSP projects need match funding. Although match funding criteria are relatively flexible, applicant authorities may find it easier to source match funding for some types of projects than others, or for projects in certain locations within their areas.

Quality of options to be promoted

SCSP projects will frequently be promoting existing transport infrastructure and services. If no complementary funding is available to improve these, care must be taken to ensure that they are of appropriate quality to meet potential new users' needs.

Some previous smarter choices projects have sought to promote poor quality options (such as active travel routes that are perceived to be unsafe, or public transport services that are frequently unreliable). The projects then lack credibility and sometimes deliver poor value; it may be better to prioritise SCSP work elsewhere, or delay SCSP projects until improvements to infrastructure or services can be provided.

Political and public acceptability

Effective projects must be acceptable to their target audience and key decision makers. Projects should be reconsidered if designers are not confident that:

- The project is likely to be welcomed by the target audience and that its messages are likely to be credible to them
- The project fits well with relevant policy, and the aspirations of key decision makers and partners

Engaging with project partners and other stakeholders during the project planning process should help SCSP project designers to understand these issues.

Deliverability

SCSP projects must be deliverable within the one-year funding availability. Projects that cannot be, or for which there are significant timescale risks, should be reassessed or modified in order to make them so.

Angus Council used SCSP funding to produce maps and travel guides to newly-built community campuses, hence enabling sustainable travel advice to be available from when people were first making use of these facilities.

East Lothian used SCSP funding to promote sustainable travel options to people attending major events, hence encouraging inclusive access and reducing traffic congestion.

One authority developed and led a workplace cycle challenge initiative, but had some delays during procurement. As a result, the promotion of the local project took place at the same time as that of a similar nationwide initiative, causing confusion for target workplaces.

Developing an Events Calendar, which can be shared between partners and between different public-facing Council-run programmes, can help co-ordinate effort and expand the reach of SCSP projects.

Summary/key points

- SCSP projects are not undertaken in isolation, so project designers need to account for a range of external factors
- These factors include:

- Other recent or on-going projects
- Availability of match funding
- Quality of options to be promoted
- Likely acceptability
- Deliverability

Links and References

- **When/where this fits in the project timeline**
 - Alongside the project planning process – October/November
- **Who else needs to be involved**
 - Potential project partners, who may be able to provide knowledge of other projects and insight into opportunities and constraints
- **Links to other sections**
 - [2.2.1 - Setting and prioritising who to target](#)
 - [2.2.2 - Setting clear objectives](#)
 - [3.2.2 - Risk planning and management](#)
 - [3.2.4 - Stakeholder management](#)
 - [3.3.4 - Match funding](#)
 - [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#)
(Password: SCSP)
- **References**
 - Smarter Choices, Smarter Places (2017) *Application Guidance*. Scotland: PathsforAll

2.3 Understanding your customers

2.3.1 Drawing on existing insight

Introduction

Before you collect new information through any primary research, it is important that you check you have accessed available secondary or desk research material. This section highlights useful sources of insight you can draw on.

National Datasets

National datasets, such as Census travel to work data and the results from the Scottish Household Survey travel diary, can be limited in their ability to provide insight into the travel needs of small communities, but can nevertheless be useful in some circumstances, especially for making comparisons. Data sources that may be useful to provide insight for SCSP projects include:

- Scottish Transport Statistics (providing key information on the transport system and its use): available from www.transport.gov.scot/publications
- Transport & Travel in Scotland (findings from the Scottish Household Survey): available from www.transport.gov.scot/publications with detailed information available from <http://www.transportscotland.gov.uk/statistics/scottish-household-survey-travel-diary-results-all-editions>
- Sustrans' 'Hands Up' survey results relating to travel to school: <http://www.sustrans.org.uk/scotland/schools/hands-scotland>
- Cycling Scotland's National Assessment Of Local Authority Cycling Policy: <http://www.cyclingscotland.org/policy/national-assessment-of-local-authority-cycling-policy>
- Scottish Index of Multiple Deprivation (SIMD) data: <http://www.gov.scot/Topics/Statistics/SIMD>

Other data sources that might be available to give more local insight into the travel needs or lifestyle aspirations of the target population include:

- Local traffic models, especially if they have robust matrices of the origins and destinations of journeys
- Citizens Panel surveys or any other previous quantitative research
- Reports from local charities or other representative community engagement processes

Segmentation models

Existing models are useful for thinking about how your target market might segment into different groups and what associated characteristics they have. Some models also suggest how segments may be engaged with or influenced.

Driver segmentation

Insight into the attitudes and needs of car drivers is essential if they are to be successfully encouraged to change to other modes. Two sources are particularly useful:

1. “DfT’s 2011 publication **Climate Change and Transport Choices Segmentation Model - A framework for reducing CO2 emissions from personal travel**” identifies households that have cars as typically falling into one of six categories:

- 1 Older, less mobile car owners (9% of population)
 - 2 Less affluent urban young families (21% of population)
 - 3 Less affluent older sceptics (12% of population)
 - 4 Affluent empty nesters (9% of population)
 - 5 Educated suburban families (17% of population)
 - 6 Town and rural heavy car use (13% of population)
- and those that do not have a car as one of three:
- 7 Elderly without cars (6% of population)
 - 8 Young urbanites without cars (7% of population)
 - 9 Urban low income without cars (5% of population)

More detail about these categories is provided at

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49971/climate-change-transport-choices-full.pdf

Understanding which of these categories people in your target market are likely to fall into will be helpful in defining how to promote sustainable travel messages effectively.

This research presents households’ attitudes to car use as belonging to one of nine segments. Their ‘segment snapshots’ are:

Car owning segments (at least one vehicle in household)

- 1 Older, less mobile car owners (9% of population)
 - Older, all have mobility difficulties
 - Transport behaviour shaped by lack of mobility
 - Travel less than all other car owning segments
 - Heavily reliant on the car to get around
- 2 Less affluent urban young families (21% of population)
 - Lower travel needs, desire to own larger/faster car but behaviour constrained by relatively low income
 - Relatively less reliant on the car than other car owning groups
 - Less well educated, more ambivalent about climate change
- 3 Less affluent older sceptics (12% of population)
 - Older, very few have mobility difficulties; less affluent
 - Lower travel needs, related to lower incomes and life-stage
 - Low level of education, more sceptical about climate change
- 4 Affluent empty nesters (9% of population)
 - Older, largely retired, affluent, well educated
 - Average levels of car travel; drive less than younger affluent segments
 - Mostly likely segment to buy cars brand new
 - Pro-environmental but more sceptical about climate change specifically
- 5 Educated suburban families (17% of population)

- Working age, higher income, well educated, many have children
 - Travel and drive a lot; most likely segment to travel by plane
 - Positive about cycling, but distances and safety are barriers
 - Concerned about climate change but have high travel needs
- 6 Town and rural heavy car use (13% of population)
- Working age, higher income but less well educated
 - Most “rural” segment, but also living in urban areas
 - Highest levels of car ownership and car travel; own largest cars
- Speed/performance and style/design important in car buying

Non-car owning segments (no vehicle in household)

7 Elderly without cars (6% of population)

- Oldest segment, high level of mobility difficulties
- Very low travel needs, do not travel long distances
- Reliant on lifts from others and public transport to get around

8 Young urbanites without cars (7% of population)

- Younger, well educated, big city-dwellers (many in London)
- Heavily reliant on walking and public transport to get around
- Transport behaviour results from location and life stage, may change

9 Urban low income without cars (5% of population)

- Younger, low income, low education, high levels of unemployment
- Low travel needs, reliant on walking and public transport
- Aspire to car ownership but cannot afford a car

2. **Jillian Anable’s research into the characteristics of drivers used attitudinal theory and identified six distinct groups with characteristic profiles of age, gender, employment and income.** Each segment is defined in terms of its ‘potential switchability’, and identifies some factors which may be indicative of susceptibility to reduce car use or of the main motivators against change. In addition, it suggests what each segments’ most likely alternative to travelling by car might be. As such, the framework could be used to define promotional campaigns. Defined segments:

- Discontented Drivers
- Complacent Car Addicts
- No Hoppers
- Aspiring Environmentalists
- Car-Less Crusaders
- Reluctant Riders

For the full detail go to:

<https://architexturez.net/system/files/pdf/7628.content.06170.pdf>

Lifestyle segmentation

The Scottish Government’s Climate Change segmentation tool assessed different people’s likelihood of adopting more sustainable behaviours, including some related to travel choices. It identifies households in Scotland as belonging to one of nine segments, each with similar characteristics and attitudes around the key climate change behaviours. A pen

portrait is available for each segment setting out key features, including key demographics and communication strategies at:

<http://www.gov.scot/Topics/Environment/climatechange/resource-materials/segmentationtool>

Summary/key points

- Always look for and drawn on existing (secondary research). It won't necessarily provide exactly what you need to fully profile your target market but it will help your build understanding of them.
- Existing models are useful for thinking about how your target market might segment into different groups and what associated characteristics they have. Some models also suggest how segments may be engaged with or influenced.

Links and References

- **When/where this fits in the project timeline**
 - Alongside the project planning process – October/November
- **Who else needs to be involved**
 - Potential project partners, who may be able to provide knowledge of other projects and insight into opportunities and constraints
- **Links to other sections**
 - [2.2.1 - Setting and prioritising who to target](#)
 - [2.2.2 - Setting clear objectives](#)
 - [2.4 - Designing your project](#)
 - [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#) (Password: SCSP)
- **References**
 - Thornton, A, Evans, L, Bunt, K, Simon, A, King, S & Webster, T (2011). Climate Change and Transport Choices: Segmentation Model – A framework for reducing CO2 emissions from personal travel. The Scottish Government [online]. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49971/climate-change-transport-choices-full.pdf [Accessed 01/09/17]
 - Anable, J. Complacent Car Addicts or Aspiring Environmentalists? Identifying travel behaviour segments using attitude theory. Department of Surrey, The University of Surrey. Available from <https://architexturez.net/system/files/pdf/7628.content.06170.pdf> [Accessed 01/09/17]
 - Experian (2012). Climate change segmentation tool. The Scottish Government [online]. Available from: <http://www.gov.scot/Topics/Environment/climatechange/resource-materials/segmentationtool> [Accessed on 01/09/17]

2.3.2 Primary research

Introduction

If you don't feel that extant information is sufficient to set SMART behavioural objectives for the project and develop an appropriate intervention(s), new understanding and insight into your target audience must be gathered. Primary research will do this.

Primary research

Before you collect new information through primary research, check you have accessed available secondary or desk research material and gathered stakeholder views into the behaviour of the audience that you are interested in.

Primary research can involve gathering data from different sources, using a mix of methods. There are two distinct research methodologies to draw on: quantitative and qualitative.

Quantitative research – this involves gathering information from a relatively large number of research subjects (e.g. young people, employees, teachers etc.) and is good when you need to describe and build a general picture of a population's behaviours (e.g. how often families cycle together or employees walk to work).

A quantitative methodology often uses social survey tools – e.g. questionnaires that can be completed via face-to-face interview, over the telephone, or by the research subjects themselves either online via an email link or in hard copy form (e.g. with the questionnaire sent through the post).

Qualitative research – this methodology is useful when you need to explain in more depth and detail what a group feels, gather insight into why they behave the way they do, and what is likely to drive their behavioural choices.

A qualitative methodology often gathers information in a less structured way (such as in a focus group) than the quantitative approach and from fewer people who come together in smaller (e.g. 2-4 people) or larger (e.g. 5-8) groups, where a conversation is facilitated by a researcher.

Commissioning new primary research can be expensive, so, before you commit to it, ask yourself:

- Do you need to collect new data? Are there extant datasets, or information you can glean from previous projects?
- Why do you need the information and how it is likely to help you develop the project (e.g. for audience segmentation purposes)?
- What experience (and time) does your own team have in designing a research methodology, collecting, collating and analysing new primary data?
- If you need some external help, do you have the resource to commission an external market research organisation?

Summary/key points

- Gather appropriate secondary research and views from stakeholders first
- Consider what mix of methods is required – quantitative and qualitative – and how you are going to collect the data
- Commission specialist help/market research if necessary

Links and References

- **When/where this fits in the project timeline**
 - Primary research, if required, can fall within both the Pre-application planning (October-November) and Submission development (December–January) stages of the process.
- **Who else needs to be involved**
 - People from your own team or/and an external body with experience of gathering and working with customer-focussed research and actionable insight to set SMART behavioural objectives.
- **Links to other sections**
 - [2.2.1 - Setting and prioritising who to target](#)
 - [2.2.2 - Setting clear objectives](#)
 - [2.3.3 - Drawing out actionable insights](#)
 - [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#) (Password: SCSP)
- **References**
 - Warren, M. A newcomers' Guide to Market and Social Research. The NSMC [online]. Available from: http://www.thensmc.com/sites/default/files/469_1261695906MRSANEWCOMERSGUIDETOMARKETANDSOCIALRESEARCH.pdf [Accessed on 01/09/17]

2.3.3 Drawing out actionable insights

Introduction

Actionable insight is 'useful' insight. Drawing on available research to identify useful information, particularly about how your target audience(s) sees things, will help you design a project that will have the desired impact on their behaviour.

Actionable insight

You need good customer insight to design projects that are powerfully focussed on the audience you are trying to reach and engage. The more 'customer-focussed' your project is, then the more likely it will be to succeed.

Insight helps you to segment your audience into smaller groups or clusters that share similar characteristics, particularly in relation to what they feel and think about things that shape their travel behaviour choices. If we are to influence their choices, we need to understand what considerations and drivers sit behind them. This is where **actionable insight** comes in – understanding that we can use to build our projects upon.

Some examples of research findings that could be considered 'actionable insights' – because you do something with them - are:

- Awareness of the local cycle network has been found to be low.
- Willingness of teenagers to cycle is much lower among girls than boys.
- Some employers can't cater for demand for car parking: staff see this and hence understand the need to change.
- Road and personal safety concerns are big barriers to parents letting their children walk or cycle and hence to get children to walk or cycle more may require an intervention targeting parents.

Actionable insight can be drawn from existing research and reports or from other sustainable transport projects that you can learn from. You may also feel you need to carry out fresh local research and insight gathering to understand your target audience better.

A key role of actionable insight is to help you develop a project that will offer the target audience something that they will see as being of value to them. Useful insight will help you consider what your audience sees to be the costs or difficulties of engaging with what the project will offer. Ideally, in your customers' eyes the perceived benefits need to outweigh the costs of engaging with the project. Understanding how the customer weighs up the costs and benefits (or the pros and cons) is what we call 'Exchange Analysis'.

It is also important to use insight to understand what might be competing for the time and attention of the target audience. For example, for some people the ease and convenience for car travel is likely to compete against travel choices that might mean accepting longer journeys. Similarly, the pull of most computer games might leave little space for a young person to start thinking about how they could use their time in more active ways.

Focusing activities at times when people are already having to change travel behaviour can be particularly effective. SCSP projects have included promotion of active and sustainable travel choices to:

- Employees whose place of work is changing
- Children making the transition to a new school
- Recent first-time parents

Summary/key points

Actionable insight is ‘useful’ insight. When deciding if information you have to hand is useful and potentially actionable, it might be helpful to ask 4 simple questions:

1. Reality - Does it reflect something significant in people’s lives?
2. Relevant - Is it applicable to encouraging the behaviour shifts we are looking for?
3. Ring bells - Does it ring true?
4. Reaction - Will people act or think differently if we apply it?

Links and References

- **When/where this fits in the SCSP timeline**
 - Actionable insight is most valuable, indeed necessary, before you start developing the detail of your project. This could be anytime over October – January.
- **Who needs to be involved**
 - The insight can come from a variety of sources – e.g. from existing research evidence, from a key stakeholder, or from fresh research. SCSP officers and others responsible for developing the project need to use the intelligence available and decide what insight is key and actionable.
- **Links to other sections/associated tools/useful resources**
 - [2.1.2 - Travel behaviour change insight](#)
 - [2.2.1 - Selecting and prioritising who to target](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [2.3.2 - Fitting and SCSP project into existing projects, opportunities and constraints](#)
 - [Effective SCSP project design & delivery: Customer orientation, insight and segmentation \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Competition and exchange \(Video\)](#) (Password: SCSP)
- **References**
 - The NSMC (2016). *Criteria for success*. The NSMC [online]. Available from: <http://www.thensmc.com/content/criteria-success - Insight> [Accessed on 01/09/17]

2.4 Designing your project

2.4.1 The Intervention mix

Introduction

To influence behaviour significantly, and sustain this over time, a range of approaches is usually required. The intervention mix sets out the key 'levers' that you can pull to influence behaviour change. As such, it is a useful tool to assess and plan what types and mix of interventions will best affect the desired active and sustainable travel behaviour change (or maintenance) in the target audience(s).

The Intervention Mix

Although there are many potential approaches to influencing behaviour, the Intervention mix sets out that these are likely to be based on one or, more likely, a combination of the following main spheres of influence:

Support	Giving people the means and solutions to adopt the desired behaviour
Design	Changing the environment, physical context and our services to support the new behaviour
Inform and Educate	Providing information to advise, build awareness, persuade and inspire
Control	Steps to legislate, require, enforce and set standards

With a focus on your target customer, using the relevant insight that you have gathered, and with knowledge of the objectives of your project, you can consider what specifically can be done within each of the above spheres of influence to shape your intervention mix.

Assess the potential impact of each proposed element of your intervention mix on the target audience by considering the exchange process – the benefits and costs of changing or maintain the associated behaviour. For example:

- How will this impact on the costs of the desired and problem behaviours, e.g. in terms of money, inconvenience, risk, opinions of others, self-perception etc.?
- How will this impact on the benefits of the desired and problem behaviour, e.g. in terms of financial savings, lifestyle, opinions of others, self-perception etc.?
- How will this strengthen/enhance any existing incentives for the desired behaviour?
- How will this reduce/remove any incentives for the problem behaviour?
- How will this strengthen/enhance any barriers or blocks to the problem behaviour?
- How will this reduce/remove any barriers or blocks to the desired behaviour?

Remember to stay focussed on how to increase the target market's perception of value.



For SCSP projects, the typical types of interventions that might fall within each category will include:

- Support
 - Cycle training
 - Health walks
 - Dr Bike sessions
- Design
 - New or improved active travel routes or placemaking schemes (generally not fundable from SCSP, but SCSP can help promote those funded through other means)
 - New or improved public transport services
- Inform & educate
 - Mapping
 - Journey planning apps
 - Travel guides
 - In-class school workshops
 - Workplace staff engagement events
- Control
 - Car parking policies
 - School traffic exclusion zones
 - 20mph speed limits

Many roads in the Western Isles are single track, without space for dedicated pedestrian or cycling facilities, yet people reported that fear of traffic was one of the main barriers to them travelling actively more often. To work around this seemingly unsolvable problem, Comhairle nan Eilean Siar instigated a programme of training for large vehicle drivers, to help them be more sensitive to the needs of vulnerable road users.

Note that use of the intervention mix helps you define and shape the overall intervention, the marketing mix (in the following section) can then be used to shape and articulate, in more detail, what you need to offer the target customer to change behaviour – therefore the

intervention and marketing mix elements should be integrated with each other, e.g. they should be consistent with respect to key messages.

Summary/key points

- The Intervention mix sets out 4 'levers' to influence behaviour change: Support, Design, Inform & Educate, and Control
- The best approach is to draw on/use a combination of these levers
- The intervention mix that you select needs to integrate with an appropriate marketing mix

Links and References

- **When/where this fits in the SCSP timeline**
 - Determining your intervention mix is part of your planning and development phases. This could be anytime over October – January.
- **Who needs to be involved**
 - The project team, providers, stakeholders and potential customer views are important.
- **Links to other sections/associated tools/useful resources**
 - [1.3.1 - Introduction to the principles of good social marketing](#)
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.4.2 - The Marketing Mix](#)
 - [2.4.3 - A design health check](#)
 - [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)
- **References**
 - The NSMC (2016). *Identify Intervention Options*. The NSMC [online]. Available from: <http://www.thensmc.com/content/identify-intervention-options-1> [Accessed on 01/09/17]

2.4.2 The Marketing Mix

Introduction

This section introduces you to the marketing mix - a useful tool to help consider, shape and articulate what your offer will be to your target customer(s).

Also called 'marketing's 4Ps' (see Fig.10 below), the marketing mix relates to creating the right **product**, service or intervention, **promoted** at the right **price** and delivered in the right **place** for the target customer. It is also useful to consider additional elements (more Ps), which are particularly relevant to services and interventions - **people**, **process** and **physical evidence**.

The Marketing Mix

The Marketing Mix will help ensure that your SCSP project is designed to provide the right services in order that your target customers might change behaviours in the way that you want, and are likely to want to engage with the project.

Product

What is your SCSP project going to offer your target audience that they are going to want or need and value? As such, what does the customer want from the product – what are the features and benefits, tangible and intangible?

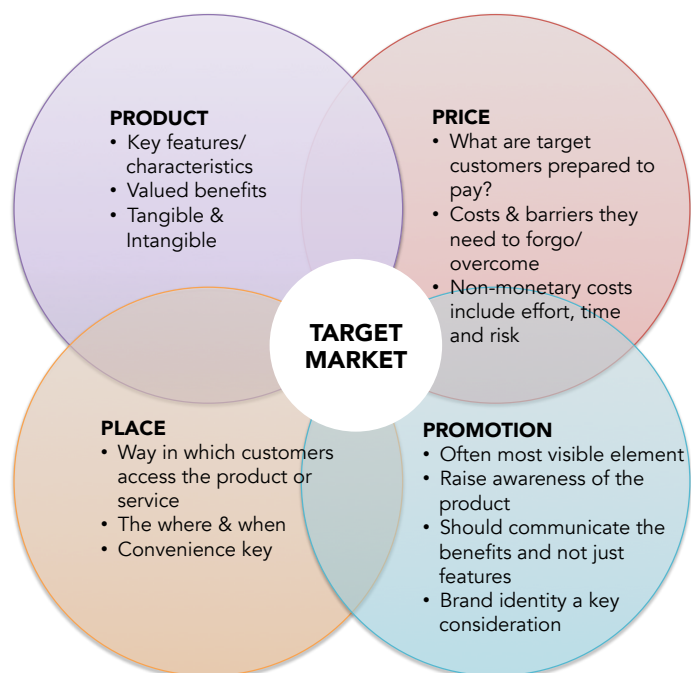
Price

Commercially, a product or service is only worth what customers are prepared to pay for it. In terms of an intervention e.g. persuading people to cycle to work, price is about what a person is willing to give up (i.e. costs and barriers they need to forgo) in return for making their journey to work on a bicycle. In addition to monetary cost, non-monetary costs include effort (including emotional effort), time and risk, for example, being prepared to cope with poor weather and road conditions to having to buy additional gear such as better lights etc.

Place

Place refers to distribution and therefore the ways in which consumers access the services they require – the where and when. Convenience is a major factor influencing their decision, and lack of convenient facilities can be an important barrier to adopting or

Fig.10 – The marketing mix



SCSP projects have found success if public engagement has been hosted in locations that are already attractive and can capitalise on other promotional activity – e.g. at retail parks at busy times, at other community events, etc.

sustaining behaviours. The product, service or intervention must be available in the right place, at the right time, and in the right quantity. For instance, have a local bus service that is easy to get to, has regular times and has sufficient and comfortable seating.

Promotion

Promotion plays a major role in both commercial and social marketing. The role of promotion includes making target audiences aware of what is on offer and should communicate the benefits (the value to the consumer) and not just the features.

It is often the most visible element to the consumer and other stakeholders. It includes a wide range of communications, including advertising, personal selling, public relations, sales promotions, direct mail and so on.

Decisions you need to consider include: what type of communication to adopt; which media to use; the nature of the message and the method of evaluating success. Promotion must gain attention, be appealing and be consistent in message.

Additional P's of social marketing

People

The people providing the service are a core part of the 'product' or 'brand' from the customer's perspective. The helpfulness, knowledge and concern of staff are a major determinant of whether consumers return to the service or act on the information provided i.e. for SCSP projects is that it is vital to have public-facing staff who are enthusiastic, friendly and knowledgeable.

Process

Process involves the path or journey the customer goes through in experiencing or consuming the product or service. Because services are consumed as they are produced, the consumer is involved in the production process, so the impact on the consumer should be assessed. For example, is it clear what they should do or where they should go after each stage of the journey/process? Consider what and where appropriate direction by way of prompting or signage might be required. An important element of process for many services is the waiting time involved.

Physical Evidence

For services and intangible experiences, it is also important that customers can see what they are buying. Therefore, how do you make the offer real? Testimonials and case studies help in this regard.

How to use it in practice

An appropriate product/offer must provide value for the customer. This value is in the eye of the beholder. Therefore, it is important your project gives customers what they want or need, not what you think they want. As such, it is vital to utilise the actionable insight gathered in the scoping stage to inform the development of each element of the mix. As you develop the detail, make sure you involve your target customers and key stakeholders in

developing and delivering your project, where possible (often referred to as co-design or co-production).

Also give consideration to how the mix fits with the wider areas of influence (the Intervention mix of: educate & inform, service, design and control) to support your intervention.

Remember to stay focussed on how to increase the target market's perception of value. Keep asking how the mix/offer is differentiated against the completion/competing factors and therefore how it is positioned/branded.

The following examples describe the marketing mix developed for Highland Council's Cycle to Health project and Perth & Kinross Council's Perth on the Go scheme. Mapping out a marketing mix in a similar format will help ensure that people want to engage and that you meet your objectives.

Perth & Kinross Council, Perth on the Go

<p>Product</p> <p>Alternative travel options to single occupancy car use (walk, cycle, public transport, car share)</p> <p>The benefits to participants were outlined to be:</p> <ul style="list-style-type: none"> • Save money on motoring costs • Reduced stress of driving • Reduced hassle of parking • Opportunity to get more exercise <p>Discount vouchers, including a free weekly bus ticket, were offered to reduce the cost of trying new choices</p>	<p>Price</p> <ul style="list-style-type: none"> • There was no financial cost to participants for receipt of advice or information • The advisory work reduces the time and effort required to understand and plan alternative travel options • A bike shop offer reduced cost and hassle of participant reverting to cycling, by making unserviceable bikes usable • A bus voucher removed financial cost of trying public transport
<p>Promotion</p> <ul style="list-style-type: none"> • The campaign provided the staffing to take advice and information out to engage with people in key community locations; particularly workplaces and schools • Information was delivered to people's homes • Local print media coverage helped promote the campaign and there was some limited social media coverage • Perth on the Go brand developed • This was offered by trained staff engaging with participants in their schools/workplaces to provide advice and encouragement, and by printed information and offers delivered to households 	<p>Place</p> <ul style="list-style-type: none"> • Sought to engage people in locations convenient for them (and likely to be efficient for project delivery); homes, workplaces and schools • Campaign activity focussed largely in Spring and Autumn months (avoiding Wintertime when active travel can be less appealing, and the Summer holiday period when many relevant people may be away)

Highlands Council, Cycle to Health

<p>Product</p> <p>The project provides:</p> <ul style="list-style-type: none"> • Initial 1:1 meeting between the participant and 	<p>Price</p> <ul style="list-style-type: none"> • There is no cost to the participant or the referring health professional
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<p>Velocity staff</p> <ul style="list-style-type: none"> • Each participant is encouraged to join 4 small-group rides, tailored to their cycling ability • Opportunity to participate in regular on-going rides and workshop sessions in order to maintain social interaction and enhance cycling skills <p>These provide:</p> <ul style="list-style-type: none"> • An enjoyable, regular social interaction with people facing similar issues • Real-world cycle training and experience 	<ul style="list-style-type: none"> • More sessions have been provided to make it easier for participants to fit them into their schedules • A supportive environment seems to minimise any stigma of attending • The initial 1:1 meeting gives an unthreatening entry point to the programme
<p>Promotion</p> <ul style="list-style-type: none"> • Referrals from health professionals • Self-referral (by individual or family/ friends) also welcomed • The project is advertised in supermarkets, community centres, resource centres and in Inverness's "What's On" magazine <p>The promotion highlights the benefits to the individual of participating; to their wellbeing and ability to develop new skills</p>	<p>Place</p> <ul style="list-style-type: none"> • Convenient location in central Inverness • Rides take place in a variety of settings to suit participants' needs (from off-road to busy road) • Mostly daytime rides, but workshops in evenings as well as daytime

Summary/key points

- The marketing mix (4 P's) helps you define your offer to target customers in terms of:
 - **Product** – the features and benefits on offer
 - **Price** – what people are prepared to pay for it – not just financially but also time, effort and other barriers they need to overcome
 - **Promotion** – how people are made aware of the offer and its benefits
 - **Place** – where and when people can consume or access to offer

Links and References

- **When/where this fits in the SCSP timeline**
 - Determining your marketing mix is part of your planning and development phases. This could be anytime over October – January.
- **Who needs to be involved**
 - The project team, providers, stakeholders and potential customer views are important.
- **Links to other sections/associated tools/useful resources**
 - [1.3.1 - Introduction to the principles of good social marketing](#)
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.4.1 - The Intervention Mix](#)
 - [2.4.3 - A design health check](#)
 - [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)

- **References**

- The NSMC (2016). *Develop the intervention and marketing mix*. The NSMC [online]. Available from: <http://www.thensmc.com/content/develop-intervention-and-marketing-mix-0> [Accessed on 01/09/17]

2.4.3 A design 'health' check

Introduction

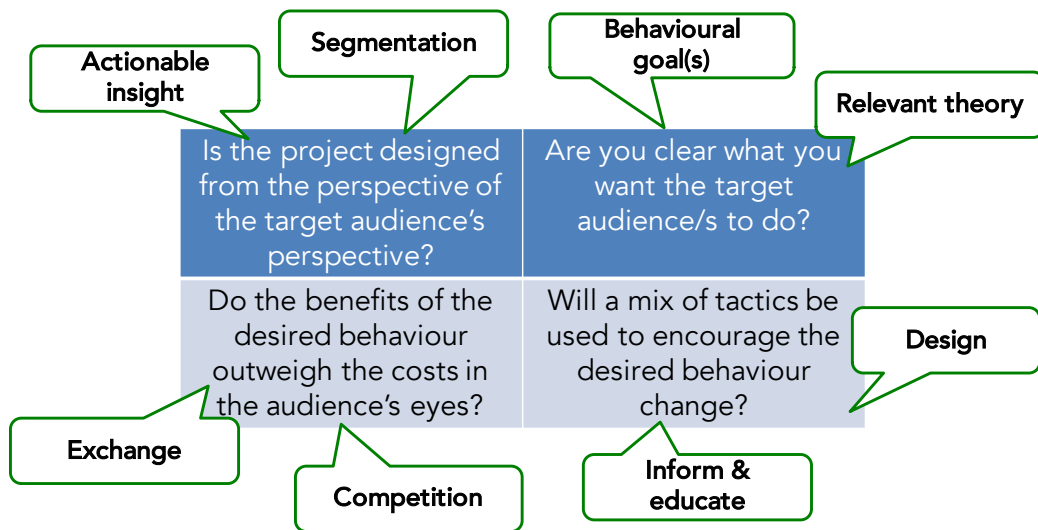
It is important to maintain a customer-focus and ensure high quality throughout all elements of your SCSP project development and delivery. As such, in order to check, and keep on track, these elements, there are a number of questions that you can ask yourself.

A project 'health' check

As set out at the beginning of this guide, the NSMC Benchmark Criteria should underpin project planning. These principles can be distilled down to 4 key questions to regularly ask yourself during the product development process (Fig.11 below shows how these questions relate to the Benchmark Criteria).

1. **Is the project designed from the target customer's perspective?**
 - o Have you involved target customers in the process? - have they been consulted with or participated in research? Have they been involved in shaping and designing the active travel offer? Are/will they be involved in testing?
 - o Having a collaborative design process with potential customers and stakeholders will greatly enhance the likelihood of delivering a successful project outcome.
2. **Are you clear on what you want the target customers to do?**
 - o You need to be clear on what you want customers to do/the project to achieve so you can plan what you need/can do to achieve this.
 - o Do you have clearly defined and SMART objectives?
3. **Do the benefits of the desired behaviour outweigh the costs in the customer's eyes?**
 - o Is the proposed offer sufficiently attractive to encourage the desired active travel behaviour(s)?
4. **Will a mix of tactics be used to encourage and support the desired behaviour change?**
 - o A single element/tactic working alone is much less likely to have the necessary impact to affect change.
 - o Can you offer a mix of tactics that make the offer easy, attractive, social and timely? (i.e. incorporate components of the [EAST framework](#))

Fig.11 - 4 development 'health' check questions



Co-design/Co-production

Whatever term is used, it is important to emphasise the positive impact that a collaborative design process involving potential customers, stakeholders and providers can have on the success/effectiveness of an intervention.

Important co-production factors/activities you should therefore aim to do, include:

- ✓ Agree at the outset what everyone's role and input will be
- ✓ Build/facilitate a good rapport, inclusive & collaborative working relationship with all parties
- ✓ Keep everyone informed on progress and how their input is being used
- ✓ Involve customers in the testing
- ✓ Encourage and support all participants to be champions!

Many SCSP projects have made use of the technical expertise of community-based assets to help them design their interventions, and also to provide a cost-effective delivery model.

Examples of projects developed with community organisations funded by SCSP include:

- Angus Cycle Hub's work to improve access to bikes and training
- CamGlen Bike Town and their programmes to encourage cycling in Cambuslang and Rutherglen

Summary/key points

To check you have a customer focus, keep asking yourselves (the project team):

- Is the project designed from the target customer's perspective?
- Are you clear on what you want the target customers to do?
- Do the benefits of the desired behaviour outweigh the costs in the customer's eyes?
- Will a mix of tactics be used to encourage and support the desired behaviour change?

Links and References

- **When/where this fits in the SCSP timeline**
 - Throughout your planning and development stages – October to January
- **Who needs to be involved**

- The project team
- **Links to other sections/associated tools/useful resources**
 - [1.3.1 - Introduction to the principles of good social marketing](#)
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.4.1 - The Intervention Mix](#)
 - [2.4.2 - The Marketing Mix](#)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#)
(Password: SCSP)
- **References**
 - The NSMC (2016). *Develop the intervention and marketing mix*. The NSMC [online]. Available from: <http://www.thensmc.com/content/develop-intervention-and-marketing-mix-0> [Accessed on 01/09/17]

2.5 Communications Planning

2.5.1. Developing a communications plan

Introduction

Communication and promotion play an essential role in developing and delivering effective interventions, whatever the shape or scale. This section sets out how to develop appropriate communications to support your SCSP projects.

Communications planning

The key to good communications planning is to be clear about:

- **Who you wish to communicate with i.e. who is your audience(s)**
- **What do you want to achieve?**

at the start of the communications planning process.

In SCSP projects, you will have a range of audiences that you'll need to engage with, about a range of things. These are likely to either have an internal/inward project focus for example, stakeholder audiences, versus an external/outward project focus on audiences such as potential, existing and past customers.

For instance, it is likely that there will be multiple stakeholders that you will need to involve in an active/sustainable travel project and therefore will need to communicate with. You may need to:

- Persuade senior management to approve and support your project
- Mobilise colleagues to join the project team and/or feed in to the project
- Seek endorsement and support from elected council members
- Find and secure match funding from 3rd parties
- Mobilise local community organisations to join you in promoting your project
- Brief frontline staff

From an outward perspective, the main focus will be to engage with current, potential and past customers to:

- Raise awareness of and promote your project offer
- Encourage participation/uptake – trail and sustained

The planning process

1. *Identify your audience(s)*

- Who are they and what do you know about them?
- For customers – past, present and future – you can draw on existing knowledge and insight and/or if necessary carry out some further primary research.
- For stakeholders, a useful planning exercise is to list stakeholders relevant to the project and map their level of potential interest in and influence on the project. This will help you to determine how best to engage with them.

2. *Determine your communication objectives*

- For each audience set out clear, SMART, communications objectives

- As with setting project objectives, the clearer your objectives, the more focussed you can be on what you need to do to achieve them.
- In the context of SCSP projects, examples of communications objectives include:
 - **To raise awareness** of a cycling and walking festival...
 - **To mobilise and brief** stakeholders and delivery partners to help promote a new active travel campaign...
 - **To build/improve** commuter *knowledge and understanding* of the benefits of active travel...
 - **To persuade** local businesses to support staff to cycle to work...
 - **To change** negative *attitudes* of local residents to about a new cycle path...
 - **To encourage trial and adoption** of a new cycle path...

The key desired effects of communication to which objectives are usually aimed at influencing are:

- Awareness/Attention
- Knowledge/Comprehension/Understanding/Image
- Interest/Desire/Liking/Preference/Believability
- Attitude
- Action – trial, adoption, purchase/consumption, re-purchase/re-consumption

3. *Identify key messages*

- Once you have decided what you want your communications to do, you need to determine what you want to say? What is the message that you want to convey to your audience? Again, the key messaging needs to be tailored specifically to your target audience.
- Note that what you want to say is distinct from how you say it. The words and tone you use will shape how you say/convey your message. Your consumer insight that you have collected will help inform this job although you may need to conduct some further specific research to test messaging and/or creative ideas. If necessary you may need to commission specialist support from a research, design and/or advertising agency.
- It is also important to consider who the appropriate messenger should be? Messengers, deliverers of the message, are as important as what you want to say. They need to be relevant and credible to the target audience.
- It is likely that, although you may have one or two target customer groups for your project, you will have many potential audiences to communicate with. For example, as highlighted above, there will be a range of stakeholders involved in your project. As such, you will to consider and make the distinction between more general/overarching messaging to applicable to multiple audiences versus the audience specific messaging.

4. *Determine your communications strategy & tactics*

- Your communications **strategy is the means by which you intend to achieve your communications objectives/goals**.
- **Tactics are the details of the strategy**
- In communications terms, determining appropriate communications strategies and tactics will involve considering:
 - Who the messenger(s) should be?

- Positioning – e.g. how to position an active travel offer in the eyes of the target audience against other/competing factors/options?
- What mix of communications tools to deploy such as advertising, PR, use of social media etc. Whatever mix of activities you deploy, they must be integrated/work together.
- Communication channel and media strategy and selection – which are the best channels to reach your target audience?
 - Again, the choices you make must be focussed on the target audiences you are aiming to reach and engage with.

SCSP projects have made use of a wide range of communications tools. Examples include:

Mass media

- Bus backs to promote campaign messages – Out & About in Midlothian

Social media

- Facebook and Twitter to advertise forthcoming events – Make Your Way campaign in South Lanarkshire

Engagement events

- Family-oriented fun events, to engage local people and promote sustainable travel – Aberdeen
- Bus promotion sessions, with buses parked in town centre locations and staff on hand to provide timetables and advice – Angus
- Electric vehicle roadshows – Aberdeenshire

Face-to-face engagement

- Personal travel planning – Moray
- Schools workshops to educate pupils with take-home information to influence family groups – Comhairle nan Eilean Siar

Summary/key points

- Be clear on who your target audience is and what you want to say at the outset.
- Make sure you consider how best to convey what you want to say (your message) to your audience and how best to deliver it/reach them. This includes thinking about who the best messenger/author is.
- Devise a strategy with an integrated mix of tactics that will ensure:
 - Clarity, credibility and consistency of message
 - Communications activity that stands out, reaches and impacts on your audience(s)
 - Integration with existing/other target audience communication – that works with rather against other audience and topic-related communication

Links and References

- **When/where this fits in the SCSP timeline**
 - Throughout the life of a project as you will need to communicate with a range of parties and different stages
- **Who needs to be involved**
 - The project team, local communications team and any specialist help (Research, advertising, design, PR agencies etc.).
- **Links to other sections/associated tools/useful resources**

- [1.3.1 - Introduction to the principles of good social marketing](#)
- [1.3.2 - Introduction to the Logical Planning Framework](#)
- [2.4.1 - The Intervention Mix](#)
- [2.4.2 - The Marketing Mix](#)
- [2.4.3 - A design health check](#)
- [2.5.2 - The communications/promotional mix](#)
- [2.5.3 - Branding](#)
- [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)
- **References**
 - Pickton D, Broderick A. (2005) *Integrated Marketing Communications*. 2nd ed. Harlow: Prentice Hall.

2.5.2. The communications/promotional mix

Introduction

This section presents a top-level summary of the key range of promotional tools you can utilise for developing SCSP campaigns and communication programmes.

Communication/promotional tools

Promotional tool	Rationale	How to use
Advertising	Advertising can be in many forms: visual and/or audio, online and offline. It is a paid for medium that allows advertisers to develop and control targeted messages at scale; but it can be expensive to develop and deploy and although it can reach many people, it can be impersonal. However, it can play a valuable part in the communications/promotional mix.	Traditionally advertising can be delivered in many forms such as TV, Radio, Outdoor, Press – these are considered offline (anything not online) channels. With growth of online/digital channels this has revolutionised advertising. Advertising on digital channels allows for the highly targeted (can be personalised) and instantly measurable delivery of messages. As such online advertising is a highly cost-effective tool and one you should give high consideration to in developing your communications/promotional mix. For instance, Facebook advertising can be very effective at targeting by demographic characteristics and location.
Offline advertising	TV, Radio, Outdoor, Press media channels will still be relevant channels depending on the profile of your target audience.	If you are considering utilising paid-for-advertising via these channels then it would be advisable to get the necessary specialist help to plan, develop and deploy these elements. Your local authority communications team may have the necessary skills and capacity to help. If not, look for a good creative/advertising/behaviour change agency for input.
Online - social media	To reach local people who are not already following you on social media, you can use adverts or sponsored posts – on Twitter, Facebook or Instagram. These are a particularly useful and cost-effective way of targeting people from specific areas and demographics and you can signpost people directly to your website so that they can find out more about recycling.	If you are not already using these channels, contact/register with the relevant platform for information on how to implement social media ads. The process is simple and they will guide you through it. However, if you're going to use these channels such as twitter, make sure you have the resources to do so – you will need to be able to provide instant responses.

<p>Online – other digital adverts</p>	<p>There are likely to be other websites used by target audiences where adverts, e.g. banners at the top of the page, could be useful for getting your message across.</p> <p>Again, these can be targeted to ensure they reach the people you want to influence i.e. people who have searched for active travel options or who have recently been on your campaign website.</p>	<p>In some cases, you may be able to speak to individual websites to develop a (possibly reciprocal) relationship of promotion/support e.g. if you're providing local travel information, provide a link widget, button or banner on local tourism website or links to/from transport operators pages.</p> <p>Otherwise, Google Ads gives guidance on generating ads for use across relevant websites.</p> <p>If you do not have the necessary skills and capacity to do this seek specialist help as above.</p>
<p>Personal selling/engagement</p>	<p>Personal selling or one-to-one engagement is the most effective communications tool. The personal interaction means that staff can recognise the needs of the client, make quick/on-the-spot adjustments, and therefore find it easier to build a relationship.</p> <p>The trade-off is that people's time is valuable and costly.</p>	<p>The greater the level of personal engagement you can utilise the better. Give specific consideration on who you can mobilise to support and promote your project that is relevant and credible in the eyes of your target audience(s). This could be public services frontline staff, community and business organisation staff, and/or supplier/provider teams.</p> <p>To mobilise such resources, you will need to give people (your messengers) clear briefing about your project – its purpose, outcomes and their role; training and follow-up support; and any other tools to do the job i.e. promotional materials – posters etc.</p>
<p>Sales promotion</p>	<p>Sales promotion includes a wide assortment of tools such as prizes, vouchers, discounts, free goods and service etc. Offering them is designed to stimulate action and can be particularly useful for getting people to try something new for the first time or again.</p>	<p>Think about where sales promotion may have a role to play and determine what would most stimulate a response from your target audience. Note that if response rates are high then sales promotion can be costly.</p>
<p>Direct marketing</p>	<p>Direct marketing is direct communications with your target consumer/audience. It can be one or two-way and includes forms such as direct mail/post, email marketing, telemarketing</p>	<p>To undertake direct marketing, you need good data – personal data to identify the target subjects and supporting data to tailor your message and offer. For any direct marketing activity, you need to have robust data governance, protection and management systems in place. Unless you</p>

	<p>and online marketing (including the online advertising mentioned above). The targeted nature of direct marketing means that it can be a highly effective form of communication. For example, delivering promotional materials along a corridor where there have been transport improvements.</p>	<p>have the in-house skills and systems, you will need specialist support to help you undertake direct marketing properly.</p>
<p>Social media s e.g. Twitter, Facebook, Instagram posts</p>	<p>Use of social media can be a valuable and cost-effective means of reaching and communicating with a 'warm' audience i.e. those who already follow or 'like' your account.</p>	<p>On Twitter, a short tweet (max. 140 characters) can be augmented by attaching an eye-catching image.</p> <p>On Facebook, the same principles apply (Facebook's algorithm particularly favours video content/animated images), although your text can be longer.</p> <p>For Instagram, the image is the main focus of the post, although your text can be added as a caption.</p> <p>In terms of the best images to use, infographics can be a useful way of attracting people's attention and conveying key information quickly and impactfully. These can be particularly useful on social media. Links to your relevant website resources should be incorporated too.</p> <p>With all social media activity, it is very important to take a committed and planned approach, in particular, thinking about when you will run activity and how this will be monitored and managed. Having the capacity and skills required to manage social media is important.</p> <p>It also gives you an opportunity to start a dialogue with the public, answer any questions they may have, ask for their feedback etc. so you could dispel myths in real time. It is a good way to remind the public of key messages and signpost them to areas of support.</p>
<p>Other - Digital screens & signage</p>	<p>Depending on availability, use of public digital/TV</p>	<p>Content is important – it needs to stand out to the target audience. Note that you don't</p>

	screens and signs in public places can be a good way to present messages to a captive audience	need to produce high production quality and therefore costly video content. Animated presentation can work well at much less cost.
Public Relations (PR)	Securing positive local media coverage such as newspapers can be an effective way of getting your message out there. They are likely to have both on- and off-line channels through which they can communicate with your audience.	<p>Contact relevant media and news outlets with a simple press release highlighting the key messages that you want to convey.</p> <p>To support your story and be ready for any challenging questions, make sure that you have thought about and prepared other questions and answers that the media might ask - see later section on Q & As.</p> <p>Involve your Communications/Corporate Communications teams from the outset and use champions/ambassadors/case studies of people who can support your story.</p>
Events	<p>Events can be an effective way of engaging with and influencing local residents – sometimes people love to speak to a ‘real human’ behind an organisation.</p> <p>You can organise your own event and/or join someone else’s event.</p>	<p>Keep an eye on the local calendar of events so you can plan your approach well in advance. Work with your internal marketing/events team to develop effective engagement strategies.</p> <p>Often, having an eye-catching stall is enough to generate interest and having some sort of interactive activity is useful – e.g. treasure hunt, quiz, etc.</p> <p>Once you have people’s attention, a good chat can be a simple but effective way of getting your message across.</p> <p>Where appropriate, look to incorporate messaging into pre- and post-event communications/promotional activity.</p>

Summary/key points

- There are a range of communication/promotional tools that you can use. They include: advertising, personal selling/engagement, sales promotion, direct marketing, social media, PR and events.
- Effective communications/campaigns utilise an integrated mix of these tools.

Links and References

- **When/where this fits in the SCSP timeline**
 - You will determine and deploy communications activity during the development and delivery stages
- **Who needs to be involved**
 - The project team, delivery partners, providers, local communications team and

any specialist help (Research, advertising, design, PR agencies etc.).

- **Links to other sections/associated tools/useful resources**
 - [1.3.1 - Introduction to the principles of good social marketing](#)
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.4.1 - The Intervention Mix](#)
 - [2.4.2 - The Marketing Mix](#)
 - [2.4.3 - A design health check](#)
 - [2.5.1 - Developing a communications plan](#)
 - [2.5.3 - Branding](#)
 - [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)
- **References**
 - Pickton D, Broderick A. (2005) *Integrated Marketing Communications*. 2nd ed. Harlow: Prentice Hall.

2.5.3. Branding

Introduction

This section explains branding and highlights the key brand considerations for SCSP projects.

Branding

Brands are more than an identity or logo. A brand is a mixture of attributes, tangible and intangible, symbolised by a logo, which if managed properly, create value and influence.

Brand associations and differentiation - consumers will develop associations with a brand – feelings, beliefs and knowledge – that are derived from a mix of what they hear about and experience with the brand offer. As such, these perceptions and associations will shape peoples’ image of the brand and how it compares with (is positioned or differentiates against) other brands/competition. The stronger your brand, particularly the emotional values of the brand which engage customers, the more loyal those customers are likely to be.

In the context of an SCSP project and active and sustainable travel, whatever offer you develop, you need to think about what desired attributes and positive associations (such as fun, healthy, safe etc.) will be relevant, credible and engaging for your target customer/ audience.

Brand identity and recognition – is the outward expression of the brand, including its name and visual appearance. The identity/logo is the fundamental means of consumer recognition. If you need to develop a new identity specifically for your project then you need a visually clear and appealing logo that, if you can, helps explain to non-users what your offer is. A carefully worded strapline can help.

Brands are hard to build because although you might aspire for customers to regard your brand in a certain way, the decision as to its actual position is determined by these customers; it is their perceptions that matter. You can only take actions to influence, not control.

Also, brand recognition/building awareness through take-up and promotion takes time and therefore investment. Before you commit to developing a new brand identity, check to see if your planned offer could be promoted as part of an existing brand – one that is relevant and already has positive awareness amongst your target consumer/audience.

Sometimes, the public sector is guilty of trying to ‘impose’ a brand – or developing a brand for the public sector rather than for the customer. Also, behaviour change is a long-term project, so ideally, you want to have a brand to which there is long-term commitment – that will continue after a specific SCSP project.

Umbrella brand identities - the creation or use of an umbrella brand identity can be useful to badge, sign-post and give recognition to a number of initiatives, partners and other projects/brands. The SCSP identity is a good example of this. Having/making use of

an umbrella brand can be useful in helping to minimise the use of stakeholder and partner brands which often they say must be included.

Brand experience – creates the brand associations and image, positive or otherwise, in the minds of the consumer. Some experiences are controllable, such as your SCSP project experience, some are uncontrolled, like word of mouth and journalistic comment. As such it is very important that you create and deliver a good quality experience and key messaging consistently. Therefore, it is important that everyone involved in delivering and promoting your project understands what the brand values are and most importantly, how their roles and actions reflect them. Brands are positioned not by what we say about them but by what we do; our strategies and behaviour at every customer touchpoint are what create the brand.

Undertake brand testing with target audiences. For example, the i-Travel York brand, which is now well recognised and liked, was originally going to be Intelligent Travel York before it was market tested and discovered (unsurprisingly) that people found it patronising and really didn't like it!

Several recent SCSP projects have developed new brands for public facing activity:

- Crieff on the Go
- Out and About in Midlothian
- North Ayrshire's Travel Smart

Many have made use of and expanded the reach of brands developed previously:

- HItravel
- Angus on the Go
- Perth on the Go
- GetAbout
- Urban Freedom
- Dundee Travel Active
- Healthy Habits

Many SCSP projects have been delivered by suppliers using their existing brands:

- Angus Cycle Hub
- Beat the Street
- Co-wheels
- Stirling Cycle Hub

Determining which approach is best for your SCSP project will depend on factors including the availability of existing brands, the scale and reach of the project, and suppliers' products; but the needs of the target audience must be key.

Summary/key points

- A brand is more than an identity or logo. It is a mixture of attributes, tangible and intangible, symbolised by a logo, which if managed properly, create value and influence.
- In planning, what your SCSP project will offer, think about what desired attributes and positive associations (such as fun, healthy, safe etc.) will be relevant, credible and engaging for your target customer/ audience.

- Before you commit to developing a new brand identity, check to see if your planned offer could be promoted as part of an existing brand – one that is relevant and already has positive awareness amongst your target consumer/audience.
- Remember that customer experience, good or otherwise, has a significant influence of brand image.

Links and References

- **When/where this fits in the SCSP timeline**
 - You will determine and deploy communications activity during the development and delivery stages
- **Who needs to be involved**
 - The project team, delivery partners, providers, local communications team and any specialist help (Research, advertising, design, PR agencies etc.).
- **Links to other sections/associated tools/useful resources**
 - [1.3.1 - Introduction to the principles of good social marketing](#)
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.4.1 - The Intervention Mix](#)
 - [2.4.2 - The Marketing Mix](#)
 - [2.4.3 - A design health check](#)
 - [2.5.1 - Developing a communications plan](#)
 - [Effective SCSP project design & delivery: The intervention and marketing mixes \(Video\)](#) (Password: SCSP)
- **References**
 - Pickton D, Broderick A. (2005) *Integrated Marketing Communications*. 2nd ed. Harlow: Prentice Hall.

2.6 Enabling success to be measured

2.6.1. Important components of monitoring and evaluation

Introduction

Monitoring and evaluation are essential for SCSP projects. They need to be 'planned into' your project at an early stage, and allow you to check progress at key points of a project and assess impact and outcomes at the end.

Monitoring and evaluation

Conducting and evaluation are not simply tasks that are carried out after the project is complete. Evaluation can be used to support the development of the project itself (formative evaluation), delivery and implementation (process evaluation), and the assessment of the overall impact of the intervention (outcome evaluation). Evaluation, therefore, can be conducted at different points in the overall process – before, during, and after implementation.

The monitoring and evaluation tasks can, therefore, be broken down into 3 discrete components:

Formative evaluation – is normally carried out at the pre-application planning stage and helps you develop the project and the monitoring and evaluation plan. For example, you might wish to test the project idea - using qualitative research methods (focus groups and in-depth interviews) - with some of the target audience to check the behaviours you are seeking to encourage will be attractive to them. Your project will need to be effective in motivating the target audience to engage in sustainable travel behaviours, and formative evaluation helps to check that it is likely to do this. It is important not to forget about the potential contribution of formative evaluation and give it the time and resources required.

Process evaluation - looks at whether the project has worked as planned. Here you are concerned with 'how' it was implemented and functioned and 'how' outcomes were achieved. It gives you a fuller picture about the reasons behind the project outcomes. You can also 'monitor' the process during project delivery. Collecting information as you go allows you to assess if the project is on track and, if not, where you might be able to refine and strengthen it. Setting out your project within a [Logical Planning Framework \(LPF\)](#) helps process evaluation as you can check activities are being delivered on time, key stakeholders are playing the roles expected of them and so on.

Outcome evaluation – is normally conducted once the project is complete, and examines what impacts and changes in behaviour have been achieved. You will need to be able to judge and demonstrate the success (or otherwise) in order to fully understand what your project has achieved: e.g. have the original goals been realised; have travel behaviours changed in the desired way/s, does the project represent good value for money; and are the lessons learned more widely applicable? Again, having a well thought out LPF to hand will identify what desired outcomes you need to measure project impact against.

Monitoring and evaluation are essential parts of an SCSP application and completion report. As well as aiding high quality project delivery, monitoring and evaluation help Paths for All and Transport Scotland justify continued funding of smarter choices. Without an approved monitoring and evaluation plan, authorities will not receive funding, and provision of the completed plan is a condition of the funding award.

Summary/key points

- It is important to consider data collection as early as possible, so that the information you need is available in the form in which you need it.
- You need clear and measurable behavioural goals so that evaluation can assess if they have been achieved.
- 'Awareness' and 'audiences' views' are important, but not as important as what actually happens to peoples' travel behaviours
- Showing that the project has achieved its desired outcomes can help you make a strong case for continued funding
- Stakeholders may hold information that will be useful for monitoring and evaluation
- Monitoring and evaluation are essential components of the SCSP application and completion processes

Links and References

- **When/where this fits in the SCSP timeline**
 - Your plans for monitoring and evaluation should be built into your planning phase – i.e. October-January – and before application submission.
- **Who needs to be involved**
 - SCSP project officers and others involved in planning (including those funding the project), plus any other bodies that are likely to play a key role in gathering monitoring and evaluation information.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [2.2.3 - Fitting an SCSP project into existing projects, opportunities and constraints](#)
 - [2.5.1 - Developing a communications plan](#)
 - [2.6.2 - Setting targets and key performance indicators](#)
 - [Effective SCSP project design & delivery: The total planning process \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: A discussion around evaluation \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: The logical planning framework \(Video\)](#)
(Password: SCSP)
- **References**
 - The NSMC (2016). *Develop the intervention and marketing mix*. The NSMC [online]. Available from: <http://www.thensmc.com/content/evaluation-1>
[Accessed on 01/09/17]

2.6.2. Setting targets and key performance indicators

Introduction

Target and key performance indicators are important elements of monitoring and evaluation. As well as giving a measure of success, they are very useful for tracking how your activity is progressing against your overall goals.

Setting targets and key performance indicators

Once you have developed SMART (specific, measurable, achievable, realistic and time-bound) behavioural objectives, you will be in position to set realistic key performance indicators (KPIs) and targets to use to measure progress and achievements against.

Think about what indicators make sense given your project's aims and objectives. These could be, for example:

- The number of children cycling to school
- The number of employees completing a personal travel plan
- The number of families who walk to the country park

These are all potentially indicators that could be 'key' to monitoring and evaluating your project's performance and success.

Try also to define your KPIs in as much detail as you need in order to make them easy to measure. For example, taking the three examples above, by adding a more precise description of the 'people' being targeted, or the 'time' dimension, we make it easier to measure them:

- The number of children from families **in neighbourhood 'A'** cycling to school **at least once a week**
- The number of employees **in local businesses employing 50+ staff** completing a personal travel plan **over the next month**
- The number of **families with two or more children** who walk to the country park **one weekend out of every four**

When you are developing your monitoring and evaluation plan you should also be thinking about targets. For example, given the scale of your project and the budget that is being spent, 'how much' change can you realistically expect to see in your target group? If you are able to set targets for each of your KPIs, then you have further strengthened your evaluation plan and it becomes easier to decide if your project has performed as you had hoped.

Again, taking the three examples of indicators above, an example of applying a target to each would be:

- **An increase of 50 children** from families in neighbourhood 'A' cycling to school at least once a week
- **A total of 100 employees** in local businesses employing 50+ staff completing a personal travel plan over the next month

- **An additional 20 families** with two or more children who walk to the country park one weekend out of every four

In some cases, your 'big' goals and objectives may take some time to be realised. So, in these cases you may need to set indicators and targets that you can measure and that give you confidence that your project is moving in the right direction. For example, say your ultimate aim is to see 20% more employees in a group of businesses taking public transport to work on a daily basis from a starting point where they are all using their cars. This outcome may take much longer than your project lasts. In a case such as this, you may need to decide on a more realistic indicator and target – e.g. getting 20% of the workforce to try taking the bus to work at least 3 times over a given period (e.g. a one month).

Summary/key points

- You need to have SMART objectives in order to set key performance indicators (KPIs) and targets.
- KPIs and targets give you the main things to aim for in terms of project success.
- Avoid being 'over ambitious' and setting targets that are unachievable.
- Be careful not to use indicators that you will have difficulty collecting information on.
- Be pragmatic. Check your targets and indicators 'feel right' for your project and you are confident that you will be able to measure progress against them as you go and at the end.

Links and References

- **When/where this fits in the SCSP timeline**
 - Throughout the planning phase – to establish, refine and aligned with having sufficient mechanisms to collect the data
- **Who needs to be involved**
 - SCSP project officers and others involved in planning (including those funding the project), plus any other bodies that are likely to play a key role in gathering monitoring and evaluation information.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [2.5.1 - Developing a communications plan](#)
 - [Effective SCSP project design & delivery: A project 'health' check \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: A discussion around evaluation \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: The logical planning framework \(Video\)](#)
(Password: SCSP)
- **References**
 - The NSMC (2016). *Develop the intervention and marketing mix*. The NSMC [online]. Available from: <http://www.thensmc.com/content/evaluation-1> [Accessed on 01/09/17]

2.7 Case studies

2.7.1. Cycle to Health – Highland Council

Introduction

The Cycle to Health project aims to increase participants' mental and physical well-being through supportive, regular group bike rides and welcomes riders of all abilities. The project is designed for people living in the Highlands, aged 18 years and over, who are suffering from mental health or wellbeing problems.

The project starts with a 1:1 meeting which is followed by an initial cycle assessment. The next step involves four weekly rides in a small supportive group with people of similar abilities, exploring safe routes in and around Inverness. Following the initial rides, there is the opportunity to stay part of the group with regular rides and workshop sessions. The project is delivered by Velocity, using SCSP funding.

Scoping

The Cycle to Health initiative was piloted in an early format in Inverness by Velocity using Climate Challenge Funding. This was supported by the Fairfield Medical Practice, who were undertaking an NHS-funded social prescribing pilot project.

The current service, provided thanks to SCSP funding, offers participants supportive, regular group bike rides and welcomes riders of all abilities. It aims to use cycling and cycle-related skills development to promote mental and physical well-being.

The target population are people who are experiencing anxiety or low self-esteem, low self-belief, have issues around motivation or who are feeling socially isolated. In its initial stages, it sought to work only with women, but the target population was expanded in 2016 to include men.



Participants do not need an "official" diagnosis. Although people can be referred through doctors and mental health practitioners, they can also self-refer or be referred by friends and family.

The project is open to non-cyclists, for whom learn-to-ride training can be provided, as well as those that can ride but who would benefit from more confidence.

Development

By providing supported cycle training and on-going events, the programme seeks to provide individuals with:

- An opportunity to meet other people with similar wellbeing issues, from whom they could gain support to tackle their own issues;

- Provide them with a useful skill (confident cycling) that would help them access a broader range of social and economic opportunities on an on-going basis.

The rationale to try this approach was based on experience elsewhere which demonstrates the wellbeing benefits of outdoor activity, in particular of the Wild Walks programme, which supported a group of people with mental wellbeing problems gain fitness and confidence through a regular programme of rural walks. The evolution of that programme towards cycling was considered to provide a good opportunity to give participants helpful skills (i.e. urban cycling) as well as outdoor exercise and social interaction.

The early participants in the pilot scheme enabled Velocity to test and refine its approach to delivery.

Marketing Mix

<p>Product</p> <p>The project provides:</p> <ul style="list-style-type: none"> • Initial 1:1 meeting between the participant and Velocity staff • Each participant is encouraged to join 4 small-group rides, tailored to their cycling ability • Then opportunity to participate in regular on-going rides and workshop sessions in order to maintain social interaction and enhance cycling skills <p>These provide:</p> <ul style="list-style-type: none"> • An enjoyable, regular social interaction with people facing similar issues • Real-world cycle training and experience 	<p>Price</p> <ul style="list-style-type: none"> • There is no cost to the participant or the referring health professional • More sessions have been provided to make it easier for participants to fit them into their schedules • A supportive environment seems to minimise any stigma of attending • The initial 1:1 meeting gives an unintimidating entry point to the programme
<p>Promotion</p> <ul style="list-style-type: none"> • Referrals from health professionals • Self-referral (by individual or family/friends) also welcome • The project is advertised in supermarkets, community centres, resource centres and in Inverness's "What's On" magazine <p>The promotion highlights the benefits to the individual of participating; to their wellbeing and ability to develop new skills</p>	<p>Place</p> <ul style="list-style-type: none"> • Convenient location in central Inverness • Rides take place in a variety of settings to suit participants' needs (from off-road to busy road) • Mostly daytime rides, but workshops in evenings as well as daytime

Implementation

Delivery of the project in its current SCSP-funded form commenced in July 2015. Velocity led the delivery, as they had initiated Cycle to Health using Climate Challenge Funding. When SCSP funding became available, The Highland Council were able to use it to continue and expand the project.



Alongside Fairfield, other local medical practices and mental health practitioners came on board as key stakeholders in order to promote the service to members of the target group. Velocity put much emphasis on recruitment and retention of the right staff to deliver the project. Experience of Velocity's staff in other programmes previously had demonstrated that the primary requirement of effective staff was having an understanding and experience of working with people that have mental wellbeing issues; it is easier to provide these people with cycling skills than give keen cyclists the expertise to work with needy individuals.



The scope of the initial SCSP project was expanded from women only to include men in order to expand the range of potential participants. The project's focus has also been adjusted to provide more capacity in learn-to-ride sessions (as opposed to sessions to increase cycling confidence), which proved to be in high demand.

Since Cycle to Health has been underway, it is being used as an exemplar project for Scottish Natural Heritage's proposed Kitemark accreditation for outdoor mental health programmes, and Stirling University is presently scoping a research project that will more formally investigate the mental wellbeing outcomes of Cycle to Health and its return on investment.

Evaluation

The target for the first year was to have 88 women participating.

The key performance indicators determined were:

- Number of sessions delivered and number of participants
- Mental wellbeing of participants
- Amount of cycling undertaken by participants

Process

Monitoring & evaluation processes were designed in from the start in order to define changes in participants' cycling and wellbeing. Data on participants' cycling behaviour and attitudes is gathered by Velocity at the initial 1:1 meeting. Participants complete a self-evaluated cycle assessment which asks about cycling frequency, confidence levels and routes they would be happy to ride along, with reasons for riding. A mental wellbeing evaluation (the Warwick-Edinburgh Mental Wellbeing Scale evaluation) is also requested from each participant.



This is followed up once they have completed their initial rides and again after 6 months. Qualitative feedback was also sought and recorded by Velocity staff.

In the 2015/16 and 2016/17 years combined, the Cycle to Health project provided the following:

Input evaluation:

- Financial spend on the project was just under £140,000.
- This funded 3 part-time staff, plus equipment and other costs.

Output evaluation:

- 87% of people that contacted the project went on to actively participate.
- Around 200 ride sessions have been delivered.

Outcome evaluation:

- 116 women and 38 men participated in the project.
- Participants generally feel more positive, both on and off their bike.
- The project resulted in a clear increase over time in how often participants ride, their levels of confidence and the number of routes they would be prepared to ride; before engagement 34% “never” rode their bike, and 34% “hardly rode at all”. This combined “never” or “hardly” score had dropped from 68% pre to 15% post-engagement.
- The 27% of participants who were “terrified” to ride on the road dropped to just 3% and the 15% of women who said they are “very confident” or “fairly confident” on the road has risen to 51%.
- 10% of participants have bought a bike since being involved in the project.
- 10% have learned to ride having never had the opportunity before.

Participants say they feel like they are part of a family or social group which encourages them to keep on cycling. They aren't cycling more because they feel they should, they are cycling more because they know it makes them feel better both emotionally, physically and socially.

Quotes from participants include:

“Finding the project saved my life, I don't recognise the person I was when I started, now nothing can stop me. It's given me lifelong tools, self-worth, health benefits and given me the gift of a good and happy future through learning a growth mind-set that will stay with me long after the project.”

“I've had depression and really struggled to get out of bed. With this project, I've been going to bed on Sunday really looking forward to Monday mornings and getting out of bed to come here. I didn't think I'd ever feel like that again.”

“I feel more confident. I was losing belief in myself, now I believe I can get out, I can have fun.”

Learnings and feedback

Success with the women's sessions in 2015/16 led to the setup of the men's sessions in 2016/17, and increased capacity provided in learn-to-ride sessions.

The scheme has been adapted to respond to some clear attitudinal differences between the genders. For instance, participating men typically report they already feel confident cycling in traffic and tend to rank themselves as feeling more positive about their emotional state and mental wellbeing than participating women. However, it appears that men are typically less willing than women to take time off work because of mental ill health. As a result, men are less likely to attend Cycle to Health activities that are scheduled during the working day and more evening sessions have been organised.

Velocity is currently exploring if there are more effective ways to engage male participants in the programme. For instance, the men's programme may re-focus on offering physical, as well as mental health outcomes.

For more information about Cycle to Health see www.velocitylove.co.uk.

- **Links to other sections/associated tools/useful resources**
 - [Effective SCSP project design & delivery: Highland, Cycle to Health \(Video\)](#)
(Password: SCSP)

2.7.2. Perth on the Go - Perth & Kinross Council

Introduction

Perth on the Go is a campaign, led by Perth & Kinross Council (PKC), which encourages residents of the city to adopt less polluting and healthier travel options than travel by single-occupancy car; to walk, cycle, use public transport or car share.



It was instigated in 2013, initially using Air Quality Action Plan Funding, received by PKC from the Scottish Government to reduce pollution from road transport vehicles within the Perth Air Quality Management Area. The increased availability of SCSP funds from 2015 enabled the expansion of the campaign's activities, which still continue.

Scoping

The idea for a campaign to encourage alternatives to car use was formulated in PKC's Air Quality Action Plan, developed because air pollution levels exceeded required standards in some locations in the city. PKC had previously worked, and continues to work, on infrastructure and traffic management solutions that would reduce pollution levels, but it was recognised that efforts to encourage changes to travel choices would be required alongside that work. As such, the idea was formed for a campaign which would encourage car drivers (when it was appropriate for them) to use less polluting modes.

Discussions between Council officers and their advisors selected car drivers living in the communities of Scone and Bridgend (east of the River Tay) as the initial target market. The worst pollution hotspots were on Atholl Street and at Bridgend, and traffic data showed that much of the traffic in the hotspots emanated in those communities. Furthermore, many Scone and Bridgend residents had reasonable alternatives available for their journeys, notably the newly-introduced Stagecoach Gold Service 7 hybrid bus.

In order to gain insight into the needs and aspirations of this target market, and define the opportunities for a campaign, a workshop was convened which drew together local Councillors, Community Council leaders, selected Council officers, Stagecoach and Tactran.

This workshop helped define:

- The most effective mechanisms to communicate with to the target audience. These sought to identify those locations and media options which could best reach and influence members of the target audience. Based on participants' local knowledge, these were agreed to be at local schools, workplaces and through printed information delivered to households
- The messages that were felt to be most effective to encourage people to change. These messages sought (based on experience from other similar projects in Scotland) to identify internal benefits to the target individual and their family groups, and were agreed to be:
 - Saving money on motoring costs
 - Reduced stress of driving in congestion

- Reduced time, cost and inconvenience of parking
- Using the bus doesn't take longer than driving in many instances (when parking is taken into account)
- An opportunity to get more physical activity into daily routine
- The campaign identity (Perth on the Go)
- Which stakeholders would help support the campaign - alongside Stagecoach and Tactran included several other local businesses.

Development

Through the provision of relevant information on available travel options and encouragement to try them, the campaign sought to encourage car drivers to try a relevant alternative mode on journeys when it was appropriate for them to do so.

The messages and media used to achieve these outcomes were heavily influenced by lessons learned in the delivery of the SCSP pilot projects (2008-2011), in particular the nearby Dundee Travel Active programme, which had trialled a wide variety of engagement mechanisms.

That experience, as well as providing practical lessons about the relative effectiveness of different communications approaches provided a strong steer on messaging; in particular of focussing on the benefits to the individual of changing their travel choices (through saving money, reduced stress, etc.) rather than environmental improvements or other external factors.

These messages were tested and validated with stakeholders during the initial discussions, and have also been refined through the on-going delivery of the campaign.

Marketing Mix

Product	Price
<ul style="list-style-type: none"> • Alternative travel options to single occupancy car use (walk, cycle, public transport, car share) • The benefits to participants were outlined to be: <ul style="list-style-type: none"> ○ Save money on motoring costs ○ Reduced stress of driving ○ Reduced hassle of parking • Opportunity to get more exercise • Discount vouchers, including a free weekly bus ticket, were offered to reduce the cost of trying new choices 	<ul style="list-style-type: none"> • There was no financial cost to participants for receipt of advice or information • The advisory work reduces the time and effort required to understand and plan alternative travel options • A bike shop offer reduced cost and hassle of participant reverting to cycling, by making unserviceable bikes usable • A bus voucher removed financial cost of trying public transport • The campaign sought to engage with members of the target audience in locations that were convenient for them (and also cost effective for delivery), most particularly: <ul style="list-style-type: none"> ○ At their workplaces ○ Through information and offers delivered to their homes ○ Through their children's schools

Promotion	Place
<ul style="list-style-type: none"> • The campaign provided the staffing to take advice and information out to engage with people in key community locations; particularly workplaces and schools • Information was delivered directly to people’s homes • Local print media coverage helped promote the campaign and there was some limited social media coverage • Perth on the Go brand developed • This was offered by trained staff engaging with participants in their schools/workplaces to provide advice and encouragement, and by printed information and offers delivered to households 	<ul style="list-style-type: none"> • Sought to engage people in locations convenient for them (and likely to be efficient for project delivery); homes, workplaces and schools • Campaign activity focussed largely in Spring and Autumn months (avoiding Wintertime when active travel can be less appealing, and the Summer holiday period when many relevant people may be away and when congestion is less of a problem)

Implementation

Initial work in 2013 focussed on the Scone and Bridgend communities:

- Local multi-modal travel guides were printed and distributed to 4,000 households;
- In-class workshop sessions on sustainable travel choices were delivered to 740 primary school pupils, and over 1,100 participated in walk to school weeks;
- Around 300 employees at 5 large employment sites received one-to-one travel advice from trained advisors;
- The campaign was publicised through social media, local print media and relevant community newsletters.



Work was led by JMP Consultants, procured through competitive tender, and managed by PKC’s Transport Planning Officer.

During implementation, strong support for the campaign was shown from local stakeholders. Tactran took a lead in the development of the campaign brand; Stagecoach provided mapping for the travel guide and funded the free weekly bus tickets; the Energy Saving Trust funded FuelGood driver training sessions to 88 people.

The messages were well received in workplaces and schools, with good levels of interest shown. Engagement sessions undertaken at two sports centres were not effective in gaining many participants, and this line of work was discontinued.



The success of the initial work was such that the approach was subsequently rolled out to other communities in Perth. The campaign has now provided local travel guides to almost

all households in city, and has worked with pupils in all of the primary schools in the area. In 2017 has revisited Scone and Bridgend with reminder messages and information.

A similar approach has also been adopted in both Crieff (where there is also an Air Quality Management Area) and in Kinross (where new developments are anticipated to lead to an increase in travel demand).

Evaluation

The following key performance indicators were determined:

Output KPIs:

- Numbers of households receiving information
- Numbers of people engaged face-to-face

Outcome KPIs:

- Public transport ridership
- Sustainable travel choices for school journeys

Monitoring & evaluation processes were planned in from the outset, and sought to establish:

- Whether participants felt that the campaign had provided them with relevant information and a good service;
- What changes to travel choices had been made by residents of Scone and Bridgend as a result.

Lacking the budget for substantial market research, monitoring used three key processes:

- An aftercare service of participants engaged at workplaces;
- Return visits to schools to assess changes in travel choices;
- Redemption rates of discount vouchers.

Key outcome statistics were:

- 12% of Stagecoach Megarider vouchers delivered to households with travel guides were redeemed. This is indicative of a significant uptake in public transport use, and is a much higher proportion than the operator typically reports for this type of initiative (and similar offers made later in other areas of Perth yielded yet higher rates). This perhaps flows from the generous nature of the offer, as well of latent interest in use of a high quality public transport service;
- The proportion of children being driven to school fell by more than a third during walk to school week in comparison with the baseline on the day of the workshop delivery.

Qualitative feedback from employees included:

- "I will now be walking at least once a week";
- "I will easily reach my target of 400 miles cycled by Christmas";
- "I have cycled to work and back several times"; and
- "Yes I used the bus. One of the best things was that I met a friend and caught up with her!"



- **Links to other sections/associated tools/useful resources**
 - [Effective SCSP project design & delivery: Perth & Kinross, Perth on the Go \(Video\)](#) (Password: SCSP)

Chapter 3

Project delivery and management

3.1 Project management and delivery success factors

Introduction

Good project management is essential for developing and delivering effective SCSP projects. This section highlights the characteristics of a successful project and the role of project management.

Projects and project management

Projects can vary significantly in scope, scale and complexity. However, all projects share a common set of characteristics. Projects:

- Are unique undertakings with an output
- Are often complex, made up of interlinked activities using multiple resources
- Involve uncertainties and therefore carry associated risks
- Have a life cycle: start, delivery and end stages

Project management is the application of knowledge, skills, tools and techniques:

- To give direction to and coordinate resources (human and material)
- To meet the objectives and required outcomes within the project constraints.



The main components of project management include:

- Activity, time planning and management
- Risk planning and management
- Budgeting and managing finances
- Stakeholder and supplier management
- Managing quality and performance

The project management pitfalls common in unsuccessful projects are:

- Scope creep – changes to the scope of project can have negative consequences/knock-on-effects on project outcomes.
- Lack of agreed objectives – if you are not clear on what you want to achieve then you will not be able to plan properly how to get there.
- Poor organisation of resources – will waste time, effort and resource, limiting your ability to deliver as much as you could within your available budget.
- Poorly defined roles - will contribute to inefficiencies, cause duplicated and potentially counterproductive effort. If people are unsure of their role this will also be demotivating.
- Poor documentation – will almost always lead to mistakes, people missing things and, critically for SCSP projects, not being able to provide the necessary funding requirement evidence.
- Overspending – running out of money will impact on your ability to deliver all the planned activities and therefore affect quality and performance.
- Over dependency – being over dependent on one or a few providers/suppliers will increase risk if a problem arises with one of them.

Summary/key points

- Although projects can vary significantly particularly in scope, scale and complexity, all share common characteristics – they are unique undertakings, involve complexity and uncertainty/risk, and have a life cycle.
- Effective project management involves managing the required activities and resources to meet the project objectives whilst being able to deal with project constraints, uncertainty and associated risks.

Links and References

- **When/where this fits in the SCSP timeline**
 - Project management is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer and core project team/steering group.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [3.2.1 - Activity and time planning and management](#)
 - [3.2.2 - Risk planning and management](#)
 - [3.2.3 - Budgeting and managing finances](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [3.2.5 - Managing quality and performance](#)
 - [Effective SCSP project planning & delivery: What is project management? \(Video\)](#)
(Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*

3.2 SCSP Project management in practice

3.2.1. Activity and time planning and management

Introduction

Activity and time planning and management is a core project management activity.

Activity and time management

To plan and manage project activities and timescales you need to identify, schedule and link individual tasks then monitor these activities as the project progresses. To do this effectively involves undertaking the following steps:

1. **Develop a project plan/list of tasks with timescales and milestones.** Drawing on your Logical Planning Framework (LPF) and SCSP annual timeline:
 - a. Sub-divide your project into key elements/phases
 - b. For each element/phase identify and list the component tasks
 - c. For each task specify its duration, the deadline for completion, and who is responsible for delivering it.
 - d. Identify, consider and note task constraints (internal/external) and linkages/interdependencies (critical path).
2. **Agree/set-up appropriate project monitoring/reporting** (see [3.2.5 Managing quality and performance](#))
3. **Monitor, review and revise the plan and task throughout the project.** A plan is not a static tool. It is important that you closely track and monitor how your project activities/tasks are progressing so that you can intervene/take further action as and when appropriate. If things are not going according to plan you may need to change it.

A **GANNT chart** is a useful tool to organise and present your project plan. It is a horizontal bar chart that graphically displays the time relationship of the steps/tasks in the project that allows you to predict/model and alter outcomes of time, cost, quality and quantity.

To create a GANNT chart:

- As noted above, list the steps required to complete the project and estimate the time required for each step.
- Then list the steps down the left side of the chart and the time intervals along the bottom.
- Draw a line across the chart for each step, starting at the planned beginning date and ending at the completion date of that step.
- You can then add milestones and highlight any dependencies between specific tasks.

Note that although there a variety of specific project management software tools that will help you create a project plan/GANNT chart, use of spreadsheet software can be adequate for this task (see Fig.12 below).

Fig.12 Example GANNT chart

During financial year being funded												
Activity	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Detail project planning by authorities	→											
Procurement processes commence	→											
Core time for project delivery and collection of monitoring data		→										
Mid-year progress report due to Paths for All						◆						
Project delivery complete												◆

Summary/key points

- Create a plan by listing all your project tasks detailing the duration, deadline and who is responsible for delivering them.
- Consider and note project constraints (time, money, human resource, etc.) and linkages/ interdependencies between tasks
- Track/monitor the plan and adjust where necessary on an ongoing basis.

Links and References

- **When/where this fits in the SCSP timeline**
 - Project management is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer and core project team/steering group.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [3.2.2 - Risk planning and management](#)
 - [3.2.3 - Budgeting and managing finances](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [3.2.5 - Managing quality and performance](#)
 - [Effective SCSP project design & delivery: Ensuring effective project management \(Video\)](#) (Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.2.2. Risk planning and management

Introduction

All projects have uncertainties and therefore carry a degree of risk. As such it is important that you take all possible steps to minimise or eliminate the occurrence or impact of significant risks/problems materialising.

Risk management

The key to risk management is to assess, monitor and mitigate risks continually throughout all stages of a project. To do this:

1. **Identify potential sources of risk** – consider where there might be risks across all elements of your project. For instance:
 - Do you have overambitious/unrealistic objectives?
 - What are the financial risks? E.g. will you be able to secure the necessary match funding?
 - Are there any risks associated with quality/delivering a quality experience for your target customer?
 - What timescale related risks do you foresee?
 - Do you have the resource to deliver and manage the project? If your project relies on external suppliers, are they available, and can they deliver in a timely manner?
 - Do all relevant stakeholders, including elected members and senior management, support the project? Might there be adverse reaction or delays from any that do not?
 - Are there outcome risks that are beyond your control? E.g. is the attractiveness of an engagement event going to be affected by bad weather?
 - Do you have an adequate monitoring and evaluation system in place? E.g. will you be able to record and document the necessary output/impact evidence to support your funding payments?
 - Will there be /are there any procurement issues? E.g. too long a process etc.
 - What are the risks associated with using a 3rd party service provider(s)?
 - What health and safety considerations are there?
 - Other sources of risks – management, policy, political, environmental etc.
2. **Evaluate and prioritise the level of uncertainty and impact.** There are many potential sources of risk in any project. Therefore, it is important that you assess their level of uncertainty and impact in order to prioritise which ones to pay close attention to. Where the impact is considered potentially significant, a thorough risk assessment should be undertaken, and the project may need to be reconsidered.
3. **Determine what can be done.** Once you have identified the key risks you need to determine and take the necessary steps to eliminate, mitigate, or deflect the issue/problem. If there are few options to do this and you need to accept the risk, build in appropriate contingencies in case the issue occurs.

The risk assessment template in your SCSP Grant Application Form should be used to identify, assess and plan for tackling project risks. Use the table to outline potential risks, effects and preventative action, including initiatives to be delivered with additional funding.

4. **Develop and implement a plan for monitoring & controlling risks.** This plan may involve redesigning your project, or parts of it, in order that some risks are reduced or removed (e.g. if it is clear that you cannot procure necessary items to meet the project timescales, alternative approaches must be found). In other instances, it may be necessary to ensure that you are carefully monitoring specific risk items, and have a pre-determined plan to respond if they occur (e.g. a bad weather event plan, or an ability to widen the geographic scope of a project if support for implementation in the original target area is lacking).

The implementation of a planned City of Edinburgh Council-staff cycle loan scheme within one authority was halted due to internal Council matters over which the SCSP officer had no control or influence. This risk maybe could not have been foreseen at the initial planning stages of the project, but alternative 'second choice' project options would have reduced the risk of failing to make use of SCSP funds.

Several SCSP lead officers have found that procurement processes (and/or capacity within their own teams or of procurement colleagues) have taken significantly longer than anticipated. Careful understanding of procurement processes can both help reduce delays, and also ensure that project plans take account of necessary timescales.

Decisions or approvals have taken longer than anticipated for many SCSP projects. Allow time for these, especially if input is needed from senior staff, if decisions must wait for meetings which occur only cyclically, or if funding approvals from partner organisations are required.

The City of Edinburgh Council's SCSP risk management process includes holding a spreadsheet of costed contingency projects.

Summary/key points

- Identify and assess uncertainty and potential risks
- Develop a plan to eliminate, reduce or mitigate prioritised/significant risks
- Continually review, monitor and update your plan to deal with issues throughout your project

Links and References

- **When/where this fits in the SCSP timeline**
 - Risk planning and management is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer and core project team/steering group.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [3.2.1 - Activity and time management](#)
 - [3.2.3 - Budgeting and managing finances](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [3.2.5 - Managing quality and performance](#)
 - [Effective SCSP project design & delivery: Risk planning and management \(Video\)](#) (Password: SCSP)

- **References**

- SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
- Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.2.3. Budgeting/managing finances

Introduction

Good financial management is an essential element of project management. Financial management is more than keeping accurate records - it involves planning, organising, controlling and monitoring financial resources in order to achieve, in this case, your SCSP project objectives. This section gives you an overview of the main elements that will help you manage your SCSP budget/finances effectively. More specific guidance on SCSP funding and budgeting is detailed in [Section 3.3](#).

Developing and managing budgets

The financial management of your SCSP project will involve estimating costs, identifying and securing funding, management of these, and reporting. Fundamental elements you should focus on are to:

1. **Develop and use an appropriate (or existing) budgeting tool** – typically a spreadsheet. You will need a tool that will allow you to consider, model and track:
 - Direct project costs (e.g. spend on suppliers) and indirect/overheads (such as Local Authority staff time, which may not impose a financial cost to your SCSP expenditure, but which can be used as match funding)
 - Internal (local authority) costs and external (3rd party/supplier) costs
 - Fixed costs (those that you know at the outset of your project) and variable costs (those that you can estimate, but cannot guarantee until project delivery is underway)
 - Expenditure of SCSP finance separately from other complementary spend on the project (so that you are keeping track of both SCSP spend and match funding)

A good tool will allow you to model income and expenditure in the planning phase so that you can determine how best to use the available finance. Whether you need help or not, it is worth involving your finance team to develop an appropriate tool and/or consider the relevant costs. Your procurement team should also be able to help with estimating/determining costs.

2. **Allow for a contingency** to cover unforeseen variations or additions
3. **Make sure you cover funding business case requirements fully**
 - Internal (e.g. departmental and procurement), SCSP and other 3rd parties have specific requirements for the ways that expenditure is controlled and monitored. It always better to be clear about these from the outset so that you avoid not having the necessary information readily available down the line, and build the reporting requirements into your budgeting tool.
4. **Document and track ongoing funding and expenditure closely** - this is particularly important for being able to meet your SCSP funding requirements and demonstrating value for money/cost effectiveness. Make sure that you have the necessary data collection and reporting mechanisms in place for this task. Ensure that your budgeting tool enables you to track the progress of your overall SCSP programme and the individual projects that it contains. Ensure you know at the outset what the planned expenditure profile will be throughout the year for each project, and track actual expenditure regularly (typically monthly) to ensure that any risks are spotted early.

Those SCSP officers that have taken time early in the project cycle to understand the requirements and constraints of their authorities' accounting and budget management processes have commonly found the financial aspects of the project completion report much easier to collate.

Clackmannanshire Council found that they needed to invest time in ensuring their SCSP suppliers and project partners understood financial management principles and processes.

Summary/key points

- Good financial management of projects involves planning, organising, controlling and monitoring financial resources. This means estimating costs, identifying and securing funding, management of these, and reporting.
- Use a suitably designed budget spreadsheet to help shape and manage your project budget.
- Make sure you consider business case and funding requirements upfront.
- Document and track income and expenditure closely.

Links and References

- **When/where this fits in the SCSP timeline**
 - Budgeting/financial management is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer/budget holder, finance and procurement team.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [3.2.1 - Activity and time management](#)
 - [3.2.2 – Risk planning and management](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [3.2.5 - Managing quality and performance](#)
 - [3.3 - SCSP Funding and Budgeting](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#)
(Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.2.4. Stakeholder and supplier management

Introduction

All projects will involve collaboration with stakeholders who will have varying degrees of interest and input. Mobilising their support and managing their expectations and input is an important part of project management.

Stakeholder and supplier management

To manage effectively and get the most out of stakeholders you should look to:

- 1. Identify & map stakeholder interest/influence** – good stakeholder management needs to start with careful planning to identify who the project stakeholders are and what interest and role they might play in the project. Stakeholders can be any individual or organisation that can affect (positively or negatively) or influence the results of a project. They can include: customers, other departments, elected officials, contractors, the public, industry/3rd sector groups, the media, etc.

It is important to analyse your relationship/potential relationship with your stakeholders. This will help you prioritise your stakeholders and give a clear overview of those who are most important to engage with and those who are least important.

To do this plot your stakeholders in terms of how much influence they have on any aspect of the project (e.g. project direction, providing funding and other resources etc.) and how interested (for instance, the degree to which the project aligns with their own plans/agenda is a key determinant of interest) they are in your SCSP project e.g. is it part of their day-to-day work? How far will their support impact upon the success of the project? See Fig.13 below.

Once you have established your stakeholders' positions within the influence and interest matrix, this will help you define the level of relationship you wish to achieve and therefore what type of engagement best suits your needs:

- The higher up the influence and interest scale the stakeholder is, the more time and energy you want to invest in them. These are the people or organisations that could make or break your initiative. They are likely to be your partners.
- Those stakeholders that have low interest and low influence will need to be kept informed, but you don't need to devote the same levels of time and energy to them, and the engagement won't need to be face to face.

Fig.13 Stakeholder influence and interest matrix

		HIGH INFLUENCE/POWER			
LOW INTEREST	<u>Potential change agents</u>	<u>Key players</u>	CONCENTRATE EFFORTS HERE	HIGH INTEREST	
	Often most difficult to engage. Take their needs into account & seek to increase their interest and engagement. Keep informed, engage where appropriate. Consider use of champions to facilitate.	Most important stakeholders – interested & powerful	KEEP THEM SATISFIED		
	<u>Indifferent</u>	<u>Back-yarders</u>			
	Keep these stakeholders informed to a degree but don't invest	Keep informed but don't invest inappropriate effort			

	inappropriate effort		
	LOW INFLUENCE/POWER		

2. Highlight key stakeholders, establish needs and expectations.

- o Once you have plotted your stakeholders on the matrix, decide a handling strategy for each matrix quadrant. Some you may wish to interview in depth, either face to face or over the phone. Others you may just want to update through a monthly newsletter.
- o Determine what information, support and resources will be required for each stakeholder.
- o Note that levels of influence and interest change during the course of a project.

3. Develop and implement stakeholder management/communications plan – to:

- o Get buy-in
- o Mobilise support/input. Be clear on what input you want/expect from stakeholders and when.
- o Keep everyone suitably informed as the project progresses. Make sure your communications fit the needs of your audience i.e. consider the appropriate tone, format and frequency etc.

Fig.14 Example stakeholder power and interest matrix: Perth on the Go

	HIGH INFLUENCE/POWER		
LOW INTEREST	Elected members Guardians of routes to get to speak to local people (school headteachers, managers in major workplaces, community group leaders, etc.)	Stagecoach (main bus service provider) Tactran	HIGH INTEREST
	Staff in other Council departments	Established local cycling groups	
	LOW INFLUENCE/POWER		

Internal Council colleagues are important stakeholders to engage in the development and/or implementation phases of projects. Ensuring that colleagues in finance, procurement and communications teams understand the objectives and requirements of SCSP projects have made the delivery of SCSP projects easier for many lead officers.

Summary/key points

- Take time to plan – identify who the stakeholders will be and think about how they influence/play a part in the project.
- To gain their support and input determine what they will need by way of information, resources and support.
- Incorporate in your communications plan suitably tailored communications activity to keep stakeholders informed and engaged. Make sure you are clear on what you want them to do and when.
- Keep an eye on any changes in stakeholder influence and input throughout the project and revise your approach as necessary.



Links and References

- **When/where this fits in the SCSP timeline**
 - Stakeholder planning and management is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer and project/steering group.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [3.2.1 - Activity and time management](#)
 - [3.2.2 - Risk planning and management](#)
 - [3.2.5 - Managing quality and performance](#)
 - [Effective SCSP project design & delivery: Ensuring effective project management \(Video\)](#) (Password: SCSP)
- **References**
 - The NSMC (2016). *Develop the intervention and marketing mix*. The NSMC [online]. Available from: <http://www.thensmc.com/content/stakeholder-engagement-5> [Accessed on 01/09/17]

3.2.5. Managing Quality and Performance

Introduction

Managing quality and performance is essential for delivering successful projects. The better-quality work you deliver, both at individual task level and overall, the better value your project outputs will provide and therefore the more likely you will be to deliver the desired outcomes. As such, it is critical that you have appropriate mechanisms in place to track and monitor performance and quality throughout a project. This section sets out the important factors for managing quality and performance.

Managing quality and performance

The following actions will help you manage performance and deliver quality in your SCSP projects (see section:

1. **Use your Logical Planning Framework (LPF) elements to help determine Key Performance Indicators (KPIs).** Identify what component KPIs will help you determine if you are meeting your objectives. Note that you won't necessarily be able to measure performance against an objective with a single measure/KPI but instead will have to set KPIs to track performance against a number of tasks/activities that will contribute towards achieving your objectives.
2. **Set milestones to check progress along the way.** Milestones are useful prompts at key stages in a project to stop and reflect/check on progress. They are also good points at which to reassess potential project risks and opportunities.
3. **Be Specific, Measurable, Achievable, Relevant, Time-bound** (see [section 2.2.2 Setting clear objectives - key considerations](#))
4. **Agree reporting inputs/data, process and frequency with all project contributors.** Make sure you determine what data you need to, and can, collect upfront. Then put in place mechanisms to capture it - as you can only report on the data you have/can collect. Ensure you include data capture and reporting requirements within specifications for suppliers or in agreements with partner organisations.
5. **Agree and schedule information sharing mechanisms:**
 - Project review meetings, team updates, one-to-ones
 - Regular progress reports from suppliers and partners
 - Face-to-face, tele/video conferencing, project management applications/software

For example, maybe you have a multi-faceted project to encourage walking to school which comprises work by parking wardens to reduce illegal parking, in-class workshop sessions with pupils and rewarding those that do walk. If you have set a KPI of increasing the proportion of children walking to school by ten percentage points, you may never be sure about which of the programme elements actually influenced choices. If it is important to you to understand which of these activities contributed to the outcomes, then project data capture will need to be redesigned. (see [section 2.6.2. Setting targets and key performance indicators](#) for more detail).

Summary/key points

- Determine indicators of performance and the key milestones across the project timeline.

- Be precise – set SMART KPIs.
- Make sure you determine what data you will need before delivery, and that your suppliers/partners can provide what you need them to. That way you will have data to report on.
- Build appropriate mechanisms to collect and report on/share the data/information.

Links and References

- **When/where this fits in the SCSP timeline**
 - Managing quality and performance is required across all stages
- **Who needs to be involved**
 - The lead SCSP project officer and project/steering group.
- **Links to other sections/associated tools/useful resources**
 - [1.3.2 - Introduction to the Logical Planning Framework](#)
 - [2.2.2 - Setting clear objectives – key considerations](#)
 - [2.6.2. Setting targets and key performance indicators](#)
 - [Effective SCSP project design & delivery: Ensuring effective project management \(Video\)](#) (Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.3 SCSP Funding and Budgeting

3.3.1. Funding eligibility

Introduction

This section sets out who can apply for SCSP grant, and what types of projects are eligible for funding.

Who can apply?

SCSP funding is available only to Scottish Local Authorities.

Funding is available only for certain types of project (see below), but each authority is provided with an indicative allocation of its maximum funding amount, this being broadly proportional to its population.

Although no other type of organisation can receive SCSP funding directly, the Application Guidance states that “grant recipients are expected to maintain effective partnerships with a range of relevant partners to ensure the success of the project. Applications must provide evidence of new or ongoing partnership working”, and also that “local authorities are strongly encouraged to involve multiple internal departments in the delivery and match funding of the project”.

Joint proposals to deliver co-ordinated and/or cross boundary initiatives between neighbouring local authorities are acceptable, providing that the connections and reporting arrangements are made clear.

What is eligible for funding?

Projects that are to receive SCSP funding “must encourage and promote active and sustainable transport as the entire focus of the initiative, or as a significant element of the initiative” (SCSP application guidance).

SCSP projects should promote active and sustainable choices for functional travel, not be focussed on leisure or tourism.

SCSP funding is only available for projects that are classed by the applicant authority as revenue expenditure, though maintenance of existing assets is specifically excluded. No capital projects can be undertaken using SCSP funds, though capital expenditure can be used as match funding (refer to section 3.3.4).

Examples of eligible projects

The SCSP Application Guidance lists the following as types of projects that are eligible for SCSP funding, though notes that this is not a comprehensive list:

Strategy Development and Implementation

- ✓ Active or Sustainable Travel Development Officers

- ✓ Baseline and ongoing monitoring of previous SCSP work - as part of a wider package of measures
- ✓ Feasibility studies on active/sustainable travel network development and/or improvement

Travel Planning Implementation

- ✓ Personal travel planning implementation
- ✓ Workplace travel planning implementation – public, private and third sector
- ✓ Health premises travel planning implementation
- ✓ School travel planning implementation– additional to current activity

Community Engagement and Social Marketing

- ✓ Utilising the Place Standard Tool to inform project development
- ✓ Other forms of community engagement to raise awareness or inform project development
- ✓ School active and sustainable travel campaigns
- ✓ Workplace active and sustainable travel campaigns
- ✓ Car share campaigns and delivery
- ✓ Organised functional walking events, e.g. led walks from a train station to an event
- ✓ Projects promoting active travel - pedometer campaigns, community challenges
- ✓ Community Street Audits
- ✓ Working with job seekers, for example with partners such as the Department of Work & Pensions

Marketing, Information and Publicity

- ✓ Campaign brand development or enhancement
- ✓ Marketing campaigns
- ✓ Awareness raising events
- ✓ Development of active travel signage, maps, leaflets, display boards, public transport timetables
- ✓ Development and promotion of route planning tools, e.g. subscription to Walk-it.com
- ✓ Active travel promotion with GPs
- ✓ European mobility week events
- ✓ World Car Free Day events

Integration with Public Transport/Transport Network

- ✓ Public transport provision, incentives and improvements, e.g. real time passenger information development; ticketing incentives; new or extended services; phone app development
- ✓ Interchange facilities/improvements, e.g. bus or cycle shelters*, maps, new/additional signage, service and route information, etc.
- ✓ Cycle parking (though if the cost is classed by the local authority as revenue funding, is a small proportion of the overall award and is part of a wider package of complementary measures)
- ✓ Additional 20mph zones
- ✓ Parking time restrictions
- ✓ Car free centres, car free days
- ✓ Research e.g. Car Club feasibility study

Reasonable costs associated with additional overheads (e.g. project management, health and safety, liability insurance) are also eligible. Although volunteer time cannot be funded, reasonable expenses to volunteers and/or community members may be funded using SCSP grant.

Examples of ineligible projects

SCSP funding may not be used for:

- ✘ Land negotiation and acquisition, planning process, etc.
- ✘ Infrastructure upgrading, repair, maintenance or creation (see point of clarification below)
- ✘ Initiatives that are primarily aimed at sports awareness/increasing sport participation
- ✘ Projects that do not focus on functional travel
- ✘ Maintenance and running costs of existing projects/programmes of work unrelated to SCSP projects
- ✘ Purchase of bicycles, e-bikes, shelters or cycle parking that is regarded by the local authority to be a capital cost
- ✘ Designs for active travel network development or improvement
- ✘ Active Travel Hubs - except those initiatives started with SCSP 2015/16 funding

Infrastructure is defined in the SCSP programme as: footways, multi-use paths, bicycle lanes and paths, cycle tracks, pedestrian crossings, pedestrian/bicycle bridges, paved shoulders, striped bicycle lanes, pedestrian signals, bicycle-activated signals, medians and other pedestrian "refuges," high-visibility crossing striping, raised pedestrian crossings, in-pavement lighting, overhead illuminated crossings, advance stop lines, warning signs, street designs that narrow carriageways and reduce traffic speed such as footway extensions and other structures and electric vehicle charging points.

Summary/key points

- SCSP funding is available to Scottish Local Authorities
- It is available for projects which promote active and sustainable travel choices for functional journey.
- SCSP funding can be used only for revenue projects, though capital spend can be used as match funding

Links and References

- **When/where this fits in the project timeline**
 - Alongside 'designing your project' (section 2.4) – Oct/Nov??
- **Who else needs to be involved**
 - N/A
- **Links to other sections**
 - [2.4 - Designing your project](#)
 - [3.3.4 - Match funding](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#)
(Password: SCSP)

- **References**

- Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.3.2. How to apply

Introduction

This section outlines the SCSP application process and the timeline of an SCSP programme.

The application process

Paths for All (who administer the SCSP grant process on behalf of the Scottish Government) will contact each Local Authority as soon as their allocation for the coming financial year can be confirmed.

Detailed guidance on submitting an application, and the application form, will be provided at the same time.

Applications are usually required to be submitted in late January or early February for the coming financial year but ***authorities are strongly advised to begin work on planning their SCSP projects for the coming year in advance of funding being formally confirmed.***

Pre-application support

Paths for All is keen to help authorities during the application process. This pre-application support is available to help authorities select projects that meet the funding criteria and are likely to deliver good value.

Paths for All also encourages local authorities to share early drafts of their emerging application documents, and to discuss any problems or perceived areas of weakness prior to the submission deadline. Doing so helps both Paths for All ensure that final applications received are more likely to be successful and enables applicant authorities to avoid potentially wasted effort.

SCSP programme timeline

SCSP provides funding for one financial year (April – March). Projects should be completed within this period.

Evidence of completion of the projects, along with monitoring & evaluation data and evidence of financial expenditure, must be submitted to Paths for All by the end of May following the financial year being funded in order for grant claims to be paid.

Each year's SCSP project necessarily therefore overlaps with that of the previous year (which may still be being reported as new projects start) and with that of the following year (the planning of which should be started during the project).

This can be of benefit, however, to ensure continuity of project delivery where appropriate, and that lessons are learned as projects and programmes progress.

Prior to financial year being funded												
Activity	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Pre-application planning by authorities						→	→					
Funding amounts confirmed & application guidance issued by Paths for All								→	→			
Applications prepared by authorities									→	→		
Pre-application support available									→	→		
Applications submitted to Paths for All											◆	
Application assessment & clarification period by Paths for All											→	→
Paths for All confirms funding allocations for coming year												→
During financial year being funded												
Activity	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Detail project planning by authorities	→	→										
Procurement processes commence	→	→										
Core time for project delivery and collection of monitoring data		→	→	→	→	→	→	→	→	→	→	→
Mid-year progress report due to Paths for All						◆						
Project delivery complete												◆
Following the financial year being funded												
Activity	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Project evaluation processes completed	→	→										
SCSP completion report and financial claims due to Paths for All		◆										

Summary/key points

- Authorities are required to apply for SCSP funding each year
- Paths for All will provide support authorities with their applications
- Funding is for a single financial year
- Authorities are strongly advised to commence planning their SCSP projects in the autumn for the coming financial year
- All projects must be fully completed and reported by the end of May following the end of the financial year

Links and References

- **When/where this fits in the project timeline**
 - Activity prior to the financial year being provided – September to March
 - Activity during the financial year being funded – April to March
 - Activity following the financial year being funded – April to May
- **Who else needs to be involved**
 - The project team and finance have the lead role
- **Links to other sections**
 - [3.3.1 – Funding eligibility](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#) (Password: SCSP)

- **References**

- Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.3.3. Assessment & allocation

Introduction

This section sets out how SCSP applications will be assessed and criteria that must be fulfilled for applications to be successful.

Application assessment

Funding allocation

Applicant authorities will be informed of the indicative level of funding that is available to them. Each authority's allocation depends on its total population, with a floor of £50,000 per annum for those with the smallest populations. Funding in excess of the indicative amount may be available if other authorities choose not to take up their full allocation.

Application assessment and support

Applications are assessed using a two-stage process:

1. Initial assessment – Proposals undergo an initial assessment by Paths for All to ensure they meet all essential criteria (listed below). Follow-up contact may be made to clarify criteria. Proposals may be rejected at this point if, after clarification, they fail to meet any one of the criteria.
2. Steering group decision – A steering group will review all proposals and scrutinise funding decisions before final awards are made. The Panel will consist of representatives from Paths for All, Transport Scotland, Regional Transport Partnerships, and the Confederation of Scottish Local Authorities. Other relevant external partners such as the Confederation of Passenger Transport may be consulted as required.

Paths for All can offer advice on proposed projects in advance of applications being submitted through their pre-application support service. Applicants are welcome to contact Paths for All if they feel they would like this advice.

Essential criteria

Proposals must meet all of the criteria below to be eligible for funding:

- To promote an increase in active and sustainable transport ([section 2.1](#))
- Be aligned with national, regional and local policy in Scotland
- Be targeted to specific populations ([section 2.3](#))
- Have match funding available ([section 3.3.4](#))
- Develop or continue partnership working ([section 3.2.4](#))
- Provide added value and/or new ideas or approaches
- Be deliverable in the short term
- Incorporate measurement and evaluation of the project, with a comprehensive evaluation plan provided ([section 2.6](#))

The specific requirements for each of these criteria are contained in the SCSP Application Guidance, circulated annually to applicant authorities.

Summary/key points

- Applicant authorities will be provided with an indicative funding allocation
- Applications are assessed using a two-stage process
- Pre-application support is available to applicant authorities
- Applications must meet eight essential criteria in order to be successful

Links and References

- **When/where this fits in the project timeline**
 - Alongside the assessment process – Feb/Mar
- **Who else needs to be involved**
 - N/A
- **Links to other sections**
 - [2.1 - How to influence travel choices and behaviours](#)
 - [2.3 - Understanding your customers](#)
 - [2.6 - Enabling success to be measured](#)
 - [3.2.4 - Stakeholder management](#)
 - [3.3.4 - Match funding](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#)
(Password: SCSP)
- **References**
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

3.3.4. Match funding

Introduction

This section sets out the requirements for match funding for SCSP projects, and provides guidance on potential sources of match.

Match funding

Overview of match funding requirements

SCSP funding can provide up to 50% of total project costs. Applicants must find the remaining funds from other sources.

Therefore, in order to secure their full potential funding award, applicant authorities must present details of projects with cost estimates totalling at least twice their indicative SCSP allocation, with at least half of the total cost funded from eligible match funding sources. Evidence of spend will be required to be provided with the project completion report.

Applicants do not need to show a match for each individual initiative within their SCSP programme; securing match for the programme as a whole is sufficient.

Match funding can come from other financed sources or from in-kind contributions of staff time or services provided free of charge to the project. More detail of each type of match funding is provided below.

In-kind contributions

In-kind contributions of up to a maximum value of 25% of the total cost of the SCSP project (i.e. a maximum of half the match funding) are acceptable as match.

Eligible in-kind costs may include services provided to the project free of charge (e.g. legal services) and staff time, but only where this is additional to, or a re-allocation of, existing resources. In-kind contributions from delivery partners, including the applicant authority, within the maximum in-kind value, are acceptable.

Application forms must specify amounts of in-kind contributions from the applicant and funding partners. In-kind contributions must specify the job titles of staff contributing time and the unit value of that resource. For example:

20 days of Senior Transport Planner at £xx per day = total of £xx.

Approved maximum staff/volunteer values of time are:

- £350 per day – professionals
- £150 per day – skilled labour
- £50 per day – volunteers

Details of the time spent working on SCSP projects will need to be provided in the completion report if in-kind contributions are to be claimed.

Financial match funding

Financial spend from other sources is required to complement SCSP grant, and must comprise at least 25% of total project costs (i.e. at least half of the match funding total).

Match funding can come from public-, private- or third-sector organisations and can include other funds from the applicant authority (subject to some constraints, listed below). For proposals that have secured match funding from partners, grant application forms must be co-signed by a relevant senior manager from the partner organisation.

Eligible match funding

Whilst SCSP funds cannot be used for any item that is classed as capital expenditure by the applicant authority, capital expenditure can be used as match funding. For example, an SCSP application could therefore include the construction and promotion of a new cycle route, with the promotional work funded from SCSP and construction from other sources.

There are many potential sources of match funding. CWSS (Cycling, Walking and Safer Streets) and Local Authority block grant funds are eligible.

Other potential sources of funding include:

- ✓ City Deal funding
- ✓ Central Scotland Green Network Development Fund
- ✓ Regional Transport Partnership funding
- ✓ Climate change funds
- ✓ Air quality funds
- ✓ Scottish Landfill Tax
- ✓ Community Planning Partnerships
- ✓ European funding (other than the LCTT Challenge Fund)
- ✓ Regeneration funds
- ✓ Developer contributions
- ✓ Public transport operators or other delivery partners
- ✓ Local authority funding, which can come from more than one department, e.g. transport, health, regeneration, planning
- ✓ Other public body funding, e.g. NHS.

Those authorities whose SCSP teams work in close partnership with other Council departments and external stakeholders have typically have much less trouble in identifying relevant match funding sources.

If in partnership with a constituted community group, funding sources can be sought that are otherwise unavailable to statutory bodies. The Funding Scotland and Scottish Education and Action for Development websites provide information on funding sources for community groups.

Any funding conditions from other funding bodies must not be breached.

Ineligible match funding

Other funding from Transport Scotland cannot be used for match funding, including that distributed by third parties. The Community Links fund, managed by Sustrans Scotland, and

the Low Carbon Travel and Transport (LCTT) Challenge Fund, administered by Transport Scotland, cannot therefore be used as match.

However, CWSS funding is an eligible source of match funding as it forms part of the main local government settlement. Other funding from Scottish Government (outwith Transport Scotland) can also be used as match funding.

Summary/key points

- SCSP funding can provide up to 50% of project costs. Applicants must find the remaining funds from other sources
- In-kind contributions can be used as match, to a maximum of 25% of the total project cost
- There are many sources of match funding, though other funding from Transport Scotland (notably Community Links and LCTT) are ineligible
- Although SCSP funds cannot be used for capital projects, capital expenditure can be used as match funding

Links and References

- **When/where this fits in the project timeline**
 - Alongside the application process – Dec/Jan
- **Who else needs to be involved**
 - Potential project partners, who may be able to help identify or provide sources of match funding
- **Links to other sections**
 - [2.2.3 - Fitting an SCSP project into existing projects, opportunities and constraints](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#) (Password: SCSP)
- **References**
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*
 - Funding Scotland www.fundingscotland.com
 - Scottish Education and Action for Development www.sead.org.uk

3.4 Procurement

3.4.1. The role and value of effective procurement

Introduction

Most SCSP projects will require the support, services and products from 3rd party providers. This section highlights the role and value of procurement in finding and working with suppliers/providers.

The role of procurement

Procurement is 'the act of obtaining or buying goods, services or works'. The aim is to secure the required goods, services, works fit for purpose - at the right price, the right quality, and at the right place and time. The process of procurement involves finding and selecting the right supplier, and agreeing and acquiring the required goods, services or works.

In the private sector, organisations have complete flexibility on how they go about this process. However, in the context of public sector procurement and therefore SCSP projects, the procurement process and team also have:

- A duty to demonstrate best value
- To facilitate competition
- To ensure openness and transparency
- To procure in line with key policies and pledges for the local authority
- To be non-discriminatory and give equal treatment
- To ensure compliance with all national, local and regional regulations and policy notes including case law updates.

In order to meet these substantial responsibilities, all local authorities will have a procurement process to promote fair and open competition for their business while minimising risk, such as exposure to fraud and collusion.

As your local procurement processes can be lengthy, it is important that you work closely with your procurement team from the outset of your project. The earlier you engage with your procurement team the better for all parties involved.

As the topic/active and sustainable travel expert, you will be responsible for determining the procurement requirements. The procurement team may manage the procurement process and lend their wider commercial expertise to help. They can advise you on the best procurement route for your needs, taking into account the nature of the goods, services or works, and the size of available budget.

The value procurement can add

Although the size and resources of local procurement teams will vary between local authorities, they will be able to offer much value to your SCSP project, either individually as

your dedicated procurement team but also collectively with other local authority procurement teams. They should be able to:

- ✓ **Provide Market Insight** – via market research, a wide sharing network, templates and lessons learned. For example, if you have identified a potential new supplier, they or partner procurement teams may already know of this supplier and be able to give you some further background on them/comment on their supplier performance etc.
- ✓ **Keep you Compliant** – ensuring you don't breach legislation which could present a legal, reputational and/or financial risk for the authority.
- ✓ **Provide Commercial acumen** – maximise the value you can get from your supplier, such as economies of scale or optimising pricing model scenarios.
- ✓ **Highlight Opportunities** – potential collaboration opportunities, use of national or local frameworks or if required set up your own framework.
- ✓ **Assist with Contract Management** – such as share potential Key Performance Indicators
- ✓ **Assist with Selection & Award Criteria** – help you get the most from the evaluation process
- ✓ **Give access/links to a Supporting Network** – Legal, Financial, Supplier Development, Community Benefit etc.
- ✓ **Provide Options appraisal** – research the most appropriate route to market taking account of your needs (timescales, budget, quality requirements)
- ✓ **Offer Post Contract Award Support** – help with supplier performance issues, contractual disputes, and guidance.

Although local authority procurement teams vary in size, capacity and procurement budget, they will be managing high numbers of procurement processes and contracts across a diverse/wide variety of areas. Although this means they are busy it also means they bring substantial commercial experience and expertise.

By way of example and to put this into context, **City of Edinburgh Council procurement team in 2017 had:**

- Has 19 procurement delivery professionals
- 2022 current live contracts in portfolio - £5.5bn
- 7,985 live suppliers purchased from in 16/17
- 57% of 16/17 spend with 10 suppliers
- Processed over 600,000 purchase orders per year
- A portfolio of procurement activity (in planning or procurement process)
 - 180 contracts
 - £7bn estimated spend
- £40m year on year target for savings
- 3% year on year target reduction in suppliers
- 2% year on year target reduction in invoices

Effective procurement involves a team approach

- ✓ Procurement are a support function and are there to help
- ✓ Working together will create efficiencies – financial, removal of duplication, collaboration
- ✓ The earlier, the better – the longer you have to plan and work together to define requirements, the better the outcome
- ✓ The procurement aim is to deliver contracts which demonstrate best value and that allow you to deliver your objectives

Summary/key points

- Procurement plays an important and valuable role in SCSP projects.
- The procurement team and process will help you obtain the goods, services or works fit for purpose and at best value, and keep you compliant with regulation/legislation.
- As you will be the topic/active and sustainable travel expert, you will be determining your procurement requirements. The procurement team will manage the procurement process and lend their wider commercial expertise to help.
- The earlier you involve your procurement team on a SCSP project the better – this will help with planning and keep the timelines (which can be lengthy) to a minimum.

Links and References

- **When/where this fits in the project timeline**
 - From planning through to implementation – October to April.
- **Who else needs to be involved**
 - Project officer and team, procurement team, any appropriate stakeholders
- **Links to other sections**
 - [3.4.2 - Procurement legislation/regulations](#)
 - [3.4.3 - How to work more effectively with procurement](#)
 - [3.4.4 - Selecting and managing suppliers](#)
 - [Effective SCSP project design & delivery: What is procurement? \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Council procurement activities \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: How procurement can add value \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Procurement questions and answers \(Video\)](#) (Password: SCSP)
- **References**
 - Kelly Faulds, Edinburgh City Council (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*

3.4.2. Procurement legislation/regulations

Introduction

An important role of the procurement process is to ensure that you and your local authority comply with all national, local and regional regulations and policy notes including case law updates. This section gives you an overview of the main areas that it is useful for you to be aware of.

Procurement legislation/regulations

The Legal Framework

- Procurement Reform Act (Scotland) 2014
- EU Procurement Regulations 2015
- Public Contracts (Scotland) Regulations 2015
- Contract Standing Orders
- Scottish Procurement Policy Notes

These are the main areas of procurement legislation that apply in Scotland. The Reform Act legislation is aimed at unifying regulation in Scotland and aligning with European procurement legislation. With the exception of Contract Standing Orders which can be determined by local authorities, the rules relating to the other legislative areas are universal/the same across all Scottish local authorities. Essentially, this means that everyone is working with the European contracts thresholds as set at in Fig.15 below.

Fig.15 – Contract procurement thresholds

	Local	Non-regulated	Regulated	OJEU
	Contract Standing Orders	Public Contracts (Scotland) Regulations 2014	Procurement Reform Act (Scotland)	EU Procurement Regulations 2014
Goods & Services	Up to £50k		£50k - £171k	over £171k
Works	Up to £50k	£50k - £2m	£2m - £4.7m	over £4.7m
Key Characteristics	Use of Quick Quote	Must advertise on Public Contracts Scotland	Must advertise on Public Contracts Scotland	Must be advertised in the Official Journal of the European Union
	Authority can choose suppliers to tender	Suppliers bid and compete	Suppliers bid and compete	Suppliers bid and compete
	Award criteria can be quality/ cost or cost only	Award criteria can be quality/ cost or cost only	Award criteria must consider quality and cost	Award criteria must consider quality and cost

Note: If there is any reason (artistic or technical expertise or the need to protect exclusive rights) that warrants a contract being carried out by a particular person or authority then a negotiated procedure may be undertaken. If not then a competitive dialogue needs to be undertaken.

The Policy Framework

In addition to legislative requirements, procurement has to follow policy. This includes:

- **SME Agenda** – in Scotland there is a commitment to support small and medium enterprises (SME's). This means that contracts need to be accessible to SMEs where possible. If not, there needs to be an explanation – why it's not appropriate. Generally, this means for potentially large contracts, breaking down the requirements into smaller components by introducing 'Lots' into the procurement contract so that SMEs have a better opportunity to supply goods, services or works.
- **Sustainable Procurement Duty** – taking into account the longer-term costs of a contract and the wider cost impact on the environment
- **Workforce Matters** - a duty to support the Living Wage and having no Zero Hour Contracts
- **Community Benefits** – for contracts over £50k community benefits should be considered whereby suppliers are required to offer some specific benefits to the community related/linked to type of goods, services or works provided.
- **Co-Production** – enabling all parties have an input to the specification and procurement process to help develop an appropriate specification. This includes consultation with end-users and providers.

Summary/key points

- Public procurement has to operate within a specific legal framework and a set of policies. As such, there are associated rules and requirements that your local procurement team and process need to follow.
- These include:
 - How contracts for goods, service and works need to be published and bid evaluated
 - The need to enable SME to be able to bid for contracts
 - Considering the wider and longer-term project and environmental costs
 - A duty to support the Living Wage and having no Zero Hours Contracts
 - Encouraging suppliers to offer contract related community benefits
 - Enabling all parties to help shape a contract via co-production/consultation

Links and References

- **When/where this fits in the project timeline**
 - From planning through to implementation – October to April.
- **Who else needs to be involved**
 - Project officer/team, procurement team, appropriate stakeholders plus end users
- **Links to other sections**
 - [3.4.1 - The role and value of effective procurement](#)
 - [3.4.3 - How to work more effectively with procurement](#)
 - [3.4.4 - Selecting and managing suppliers](#)
 - [Effective SCSP project design & delivery: Procurement regulation \(Video\)](#)
(Password: SCSP)
 - [Effective SCSP project design & delivery: Procurement questions and answers \(Video\)](#) (Password: SCSP)
- **References**
 - Kelly Faulds, Edinburgh City Council (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*

3.4.3. How to work more effectively with procurement

Introduction

Sometimes the process of procurement can be seen negatively, particularly if it appears to be taking a long time. However, as highlighted previously in this guide, procurement provides an important and necessary role in most SCSP projects. This section highlights the things you can do to facilitate a productive and effective working relationship with your procurement colleagues.

Key factors for working more effectively with procurement

1. Engage with Procurement as soon as you know you 'might' have a requirement
2. Discuss openly conflicting priorities and objectives
3. Understand clearly what your role is in the procurement process
4. Set deadlines & commit to them
5. Trust and listen to each other

Your role in the procurement process

- You are the topic expert and therefore the commissioner.
- Your procurement colleagues are there to help/guide you through the procurement process providing support where appropriate and necessary.

Planning considerations

- Know what you want to 'buy' but be open to new ways of buying it
- Forward plan – are you coming to procurement to buy something that you might need to buy again in future years?
- Do your homework – is someone else buying the same thing as you either in the Council, or in another Council?
- If you don't think that you have the capability to draft the contract, bring in support – Legal, Consultants, Industry Experts
- Be aware of the timescales – a typical procurement process can take anything from 4 – 12 months
- Allow for delays – holidays, disgruntled suppliers, contract mobilisation, approvals
- Consider procurement in risk logs, task planning etc.
- Seek guidance and advice if not sure about the procurement process/obligations
- You are the expert in the topic – not procurement – work together to create specifications, contract, award criteria

Several SCSP lead officers have found procurement rules challenging to work with. After some initial challenges, the City of Edinburgh Council's SCSP lead has developed a good working relationship with procurement colleagues. The SCSP officer now understands the opportunities and constraints of procurement rules and processes, whilst procurement colleagues now understand the specific requirements and challenges of SCSP projects.

Summary/key points

- Procurement needs must be considered at the start of your project.
- Involve procurement colleagues as soon as you know you might have a requirement.
- Work as a team – i.e. collaboratively.

Links and References

- **When/where this fits in the project timeline**
 - From planning through to implementation – October to April.

- **Who else needs to be involved**
 - Project officer and team, procurement team, any appropriate stakeholders
- **Links to other sections**
 - [3.4.1 - The role and value of effective procurement](#)
 - [3.4.2 - Procurement legislation/regulations](#)
 - [3.4.4 - Selecting and managing suppliers](#)
 - [Effective SCSP project design & delivery: Working effectively with procurement \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Procurement questions and answers \(Video\)](#) (Password: SCSP)
- **References**
 - Kelly Faulds, Edinburgh City Council, SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*

3.4.4. Selecting and managing suppliers

Introduction

Delivery of successful projects involves collaboration and teamwork. If external support is required, finding and managing the right supplier is vital for building productive working relationships and delivering good value outcomes. This section highlights important considerations for selecting and managing suppliers.

Key factors for building and managing effective relationships with suppliers

1. **Developing a clear and focussed brief** – it is vital that you clearly articulate what you want by way of goods, services and/or works so that:
 - The procurement team fully understand your requirements and can advise and support accordingly.
 - Potential suppliers can formulate their approach and accordingly develop their quote/ tender response
 - Expectations in terms of outputs and outcomes are clear to everyone
2. **Having clear and adequate assessment criteria/marketing scheme and selection process** – with appropriate input from stakeholders/delivery partners. This is necessary for having a thorough, consistent and fair selection process, and it will usually require at least two members of staff assessing the tenders independently.
3. **Building and maintaining open and transparent dialogue** – good communication is vital for managing performance and being able to deal with project issues quickly and take advantage of opportunities.
4. **Maintaining an up-to-date project plan and eye on forward activity/required outputs** – you need to know who is doing what and when, including suppliers
5. **Regular reporting and performance monitoring** – holding suppliers to account on progress is an important part of project and supplier management.

A good supplier brief for an SCSP project will typically need to clearly articulate:

- **What you want to achieve.** This might be very specific if you already have a detailed requirement and understanding (e.g. “The authority wishes to procure 20 cycle training sessions, each for 6 people, to be held at weekends in the town centre”). But you don’t have to be specific to get good value; you may wish to draw on suppliers’ expertise (e.g. “The authority has a budget of £20,000 available to promote walking to school in the town and asks tenderers for evidence-based recommendations on the best value mechanisms to achieve this”).
- **How the goods or services you are procuring fit within the broader SCSP programme or with other projects,** so that the supplier understands how their work will contribute to the whole
- **What risks you foresee with the project** (so that the supplier can demonstrate how they can mitigate them), and the need for suppliers to help you identify any other risks they identify
- **A clear requirement for collection, analysis and reporting of relevant data,** so you can easily collate your SCSP Completion Report

- **The tender assessment criteria** (the relative balance of cost, staffing and previous experience, proposed approach, minimisation of risk, etc). These should be based on your priorities for the SCSP project.

Case study: Perth on the Go

Perth & Kinross Council wanted to procure suppliers to help them design and implement the social marketing campaign which became known (during the design phase) as Perth on the Go.

Tenders were invited through the Public Contracts Scotland Quick Quote procedure: invitations were sent to consultants which the Council were aware had worked on similar projects previously.

The project brief set out the requirements of the work, its objectives and timescales for completion.

A tender assessment matrix process was described in the brief, which made use of a weighted score based on the price of submissions, the experience of the proposed project team and the quality of the methodology proposed.

Summary/key points

- Be clear on what good, services and/or works you wish to commission.
- Develop a clear brief/invitation to tender with clear and transparent evaluation criteria.
- Encourage open and honest dialogue.
- Maintain an up-to-date project plan with regular performance monitoring and reporting.

Links and References

- **When/where this fits in the project timeline**
 - From planning through to implementation depending on the need for goods, services or works – October to April.
- **Who else needs to be involved**
 - Project officer and team, procurement team, any appropriate stakeholders
- **Links to other sections**
 - [3.4.1 - The role and value of effective procurement](#)
 - [3.4.2 - Procurement legislation/regulations](#)
 - [3.4.3 - How to work effectively with procurement](#)
 - [Effective SCSP project design & delivery: Working effectively with procurement \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Supplier selection and management \(Video\)](#) (Password: SCSP)
 - [Effective SCSP project design & delivery: Procurement questions and answers \(Video\)](#) (Password: SCSP)
- **References**
 - Kelly Faulds, Edinburgh City Council, SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*

3.5 Case studies

3.5.1. Managing SCSP projects, City of Edinburgh Council

The City of Edinburgh Council acknowledges that they faced challenges in the early days of procuring and managing delivery of their SCSP projects, but lessons they learned have significantly improved their practice.

From the outset, they sought to bring stakeholders into the process of defining their SCSP programme. They initially held a workshop of members of their Active Travel team to identify priorities and workstreams that could be taken forward using SCSP funding. The Council's Active Travel Forum, which includes Councillor representation, was then consulted on the draft programme, and adjustments to it were made in response to their feedback.

Project and risk management

Edinburgh's SCSP application was split into a package of 'core' projects of highest importance, and another of 'optional' projects, included in the case that additional funding might be available. This approach was felt to maximise the potential for funding, whilst reducing the risk that an incohesive package of projects might be funded.

Once the funding has been confirmed, spreadsheets are used to host the main project management tools. One is populated with the names of each project and its forecast cost, which is updated with actual costs when known. A timeline is used to monitor whether each project is on track. This enables financial spend and project delivery risks to be monitored through the year.

Responsibilities for the SCSP Lead Officer (as the overall programme manager) and for managers of individual projects are clearly defined in order that progress monitoring is independent of project management.

Following some initial experience of over-optimistic timescales for delivery, this timeline now includes realistic estimates of the time for achieving consent from various parties for projects to get underway and for procurement exercises.

In this, Edinburgh has noted that time invested to build relationships with colleagues in other Council departments (including Communications, GIS, Finance and Procurement) understand the requirements of SCSP projects and funding (and that the SCSP leads understand the constraints facing these colleagues) has paid dividends.

Risks are further reduced by having a list of contingency projects and their costs, such that alternative delivery options are available 'on the shelf' in the case of any delay or issue affecting the intended projects.

Selecting and managing suppliers

The City of Edinburgh Council's procurement route for SCSP projects is dependent on the value of the contract, which is defined by Standing Orders.

Each project costing above £3,000 normally must go through a competitive process. Those under this value may be exempt, as are some costing more than £3,000 if the programme manager can demonstrate best value for the Council is being achieved by choosing a certain supplier. In this case a 'waiver' can be applied, subject to approval from the Head of Service and Procurement team.

Competitive processes have commonly resulted in opportunities being advertised as Quick Quotes on Public Contracts Scotland. This enables the Council to receive tenders from a short-list of invited bidders, chosen according to the client team's knowledge of which suppliers are likely to be able to provide a good value product.

Bids received are evaluated using the Council's evaluation criteria based on the most favourable mix of quality and cost. All tender submissions are evaluated by three panel members, and a consensus meeting held to identify the highest quality supplier. The cost information was then added, which then gave the winning supplier.

Chapter 4

Project completion and reporting

4.1 Finishing a project

4.1.1 Completing a SCSP project

Introduction

This section provides guidance and a checklist for the completion of your SCSP project.

Project completion checklist

Once all the hard work has been done, projects designed, procured, managed and delivered, SCSP lead officers should consider the following matters, and resolve any that remain outstanding:

- Project delivery:
 - Have you completed every action you promised to undertake?
 - Have suppliers and partners met their requirements of their briefs/commitments?
- Funding and expenditure:
 - Have all supplier invoices been received, approved and paid?
 - Have you spent all of, but no more than, your SCSP budget? What will you do about any under/over spend?
 - Have the SCSP grant conditions (for expenditure, reporting, etc) been met?
 - Is the match funding understood and reported?
 - Have the grant conditions of any matching funds been met?
- Lessons
 - What lessons were learnt, by you, suppliers or partners, during the delivery of the project?
 - Where should these lessons be recorded? Who would benefit from hearing of them?
- Celebrating success
 - Have you collated information on the successes of your project?
 - Have you communicated these internally (to line managers, colleagues in other relevant departments, etc.)?
 - Have you communicated these externally (to members of the public that participated in the project, to stakeholders that supported the project, to the community at large through media, etc.)?
 - Have you thanked those organisations and individuals that helped support or deliver the project?
 - Have you thanked those individuals that changed their travel choices, and hence enabled the project to succeed?
- Forward planning
 - What do you want the future of the project to be (should it continue in future years, should it move to new areas or otherwise adapt)?
 - If it should continue, what could be done to improve its effectiveness?

Links and References

- **When/where this fits in the project timeline**
 - Whenever projects are being completed, so especially March
- **Who else needs to be involved**
 - The project team and key stakeholders
- **Links to other sections**
 - [2.5 - Communications planning](#)
 - [2.6 - Enabling success to be measured](#)
 - [3.2.4 - Stakeholder and supplier management](#)
 - [4.1.2 - SCSP reporting](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#) (Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

4.1.2 SCSP reporting

Introduction

This section summarises the reporting requirements for an SCSP project.

SCSP reporting

In addition to the 'good practice' reporting of SCSP project outcomes to participants, partners and other stakeholders (as outlined in [section 4.1.1](#)), there are formal reporting requirements associated with the SCSP grant.

These come at two stages in the funding cycle:

- A mid-year (end of September) Progress Report, and
- A project Completion Report (due by the end of May describing work completed in the financial year just ended)

The completion of both reports is a condition of SCSP funding; payment of the grant is dependent on receipt of satisfactory reports by Paths for All.

Templates for both reports will be provided to applicant authorities by Paths for All; these must be used.

The mid-year report will provide a summary of progress against the programme timeline submitted with the application document. Any changes to the planned programme should be noted, and the reasons for these changes summarised. Actions to bring any projects which are behind programme back on track must be identified. Any risks that projects may be unable to use their full SCSP financial allocation within the year must be noted.

The end of project Completion Report will provide a summary of work delivered and outcomes achieved by the SCSP programme. It should include all the information outlined in the project evaluation plan (see below).

Supporting technical or suppliers' reports can be used as appendices to the main document if appropriate. SCSP lead officers should ensure that suppliers or partners are aware of relevant reporting requirements and timescales. Any data used or collected, including baseline data, must be retained in an accessible format and made available on request to Paths for All and/or Transport Scotland.

The project Completion Report must include a financial report showing all income and expenditure. The applicant authority must maintain full and proper accounts and records (subject to external examination/audit as appropriate), including copies of invoices which show how the grant has been used, for a period of at least 3 years. These records must be available to Paths for All or its representative(s) on request.

The grant must be shown in the applicant authority's annual accounts as a restricted fund and not included under general funds. This means that any unspent funds and/or assets in respect of the grant must be shown separately in the organisation's accounts, which must also show any interest accruing from the grant.

Evaluation reporting

Your SCSP Completion Report must contain the information you agreed to provide in the evaluation plan that accompanied your application for funding.

If some information cannot be provided, the reasons why should be noted. If information cannot be provided because the project did not get taken forward as planned and funds were diverted to other projects instead, the reasons why this occurred should be set out (as they will provide valuable learning points) and appropriate evaluation data on the alternative project given.

Evaluation data should be set out in the Completion Report using the template provided by Paths for All:

Initiative	Description	Baseline levels	Population reached	Evaluation Method	Timing	Output	Outcomes	Budget	Actual cost	Monitoring lead/partners	Lessons learned
Provide the name of the initiative.	A brief description of what the initiative involves (20 words max.).	Provide the existing levels of walking, cycling, public transport and/or car use in your target audience prior to intervention.	Provide the number and percentage of the target audience that you reached.	Provide information on how you measured the impact of the initiative, e.g. resident surveys, intercept surveys, electronic user data.	When did you measure baseline and intervention activity?	What (and how much) was delivered as part of the initiative, e.g. reports, leaflets, events, surveys completed, etc.	What was the impact of the intervention, e.g. changes in awareness, changes in mode of travel.			Who had the lead responsibility for monitoring this initiative, and who provided support?	Provide any useful information, techniques, hints or tips that would help others to deliver a similar intervention. E.g. lead-in time longer than expected, and reasons for this; approaches that increased participation rates; procurement/contracting issues and how these were dealt with; influence of external factors and methods used to control for them.

As a reminder:

- **Outputs** are what your project provided or delivered (numbers of sessions delivered, items purchased, etc.)
- **Outcomes** are what these outputs achieved in relation to your project's objectives (numbers of people that have adopted more active and sustainable travel choices, number of vehicle miles reduced, etc.)

Outcomes must be related to the baseline (i.e. the level/amount before the intervention was undertaken in order to provide useful and meaningful information. For example, to know that the proportion of children walking to school after an SCSP project is irrelevant, unless the proportion beforehand is also known and so the change can be calculated.

Links and References

- **When/where this fits in the project timeline**
 - For the mid-year report: September

- For the completion report: by end June
- **Who else needs to be involved**
 - Suppliers and partners, to provide relevant data to inform progress and completion reports
- **Links to other sections**
 - [4.1.1 – completing an SCSP project](#)
 - [Effective SCSP project design & delivery: Funding and budgeting \(Video\)](#)
(Password: SCSP)
- **References**
 - SMG, Systra (2017), *Training Day 2 - SCSP project management and delivery including procurement and finance*
 - Paths for All (December 2016), *SMARTER CHOICES, SMARTER PLACES 2017/18 Application Guidance*

Acknowledgements

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