MONITORING AND EVALUATION PLAN

With corresponding KPIs and evaluation
questionnaire

Version 1
11 2016

Content

1. INTRODUCTION

This document describes the evaluation plan of the MOVECIT project.

The MOVECIT project aims to achieve a shift of travel choices from the car to sustainable modes of transport among employees of the municipal authorities in two-pillar modal split way - in commuting from home to work and also on their business trips.

This evaluation plan describes the way the project objectives will be evaluated. The project's main objective is to improve capacity and behaviour of municipalities' staff when travelling to workplaces while at the same time changing the modes of transport, lowering CO2 and all other negative effects of car-oriented traffic by adopting the MP by municipalities.

The specific objectives are:

1. To raise awareness of municipalities' employees of the impact of their mobility behaviour and to motivate and achieve changes in this behaviour.

2. To introduce mobility plans as a strategic document of the city in the daily work agenda and pass it through the city council to gain wider acceptance.

3. To decrease CO_2 emissions by up to 20% per year among municipalities' staff through implementation of mobility plans and by changing transport mode to a more sustainable means of transport.

This plan mostly deals with the evaluation of targets set by indicators which are described in given chapters.

The monitoring will be held from April 2017 and, although the very project would come to its end by May 2019, it would continue on in order to preserve the objectives' sustainability.

It concerns mostly the data from mobility planning process and activities that change the travel behaviour of the employees including pilot actions covered in the project in the WPT3 (Development of mobility plans and pilot actions in participating CE regions) and monitored in activity A.T2.2. Qualitative and quantitative evaluation and monitoring on data provided in pilot actions.

The collecting of data will begin in April 2017 with the questionnaire research in those institutions which take part in the pilot action.

2. PILOTE ACTION

The pilot project consists of four stages:

- Preparation stage
- Analytical stage
- Proposal stage
- Evaluation stage

2.1. Preparation stage

There will be a working group and preliminary goals set up at this stage for the institution of the town office and hospital. The range of the mobility plan will be discussed (which departments will take place in the mobility plan etc.). The working group members will be specified – ideally there will be PPs, mobility manager of the municipality or other person responsible for the project, member of the department of building administration, member of the strategy planning department, member of HR department, person in charge of PR and communication at the institution and ambassadors amongst the employees.

The working group will go through all accessible information about employees' mobility and there will be questions (implemented in travel survey) approved based on the data and current situation. The working group will fill in the common questionnaire which will be used within mobility plan process. Working group will also design the motivation campaign for the change of the employees' mobility behaviour.

2.2. Analytical stage

The employees of the municipalities will be informed about the mobility issues and the meaning of the project goals in form of motivation campaign. Data collection will follow in a form of an online and a paper questionnaire for employees and the common questionnaire for the working group.

The results and conclusions of the travel behaviour research are essential for successful realization of the pilot project. On the grounds of these results, the employee mobility would be properly described, its current situation evaluated, the greatest obstacles identified and the starting position of KPI indicators defined.

Collected data will be processed and analysed. The outputs will be gathered in a report of current state of employees' mobility and modal split where all issues and problems will be described. For example:

- How accessible is the institution by different means of transportation?
- What are the weak spots in transport services?
- What are the employees mobility needs?
- Which places are problematic for pedestrians and bikers?
- How willing are the employees to change their travel behaviour?

This report will content elementary indicators (e.g. modal split), which will be valuable for evaluation of future measures for sustainable mobility implemented by the institutions and their possible success (see chapter KPI).

2.3. Proposal stage

In this stage, there are defined the goals of mobility plans based on the knowledge gained in earlier stages. The working group will set up the action plan for achievement of the goals. The plan will content specific measures and timetable of their possible implementation, along with responsible people, the means of funding and indicators of possible success.

The rules for monitoring and evaluation will be set and followed (see evaluation stage). After action plan is done, it is possible to follow with implementation of the activities set in it.

2.4. Evaluation stage

The action plan has to be regularly evaluated and actualized according the goals and meeting the targets in given time period. Monitoring is ongoing and long-term activity which should be done in regular intervals set in advance. The data for the monitoring will be gained via travel survey questionnaire and other sources. The effectiveness of the measures will be evaluated according to actual values of KPIs and its comparison before and after implementation of the measures.

There are four major steps in the evaluation process:

- definition of criteria and a set-up of comparative standards (already included in the action plan)
- evaluation of the activity in fulfilling given assignments and comparison of the results with the early-defined standards
- diagnosis of the rendered results
- conclusion with a proposal of possible reformation/correction (the action plan updating)

2.5. Timeline of the pilote action

TERM	ACTIVITY	OUTPUT
November 2016	First meeting	minutes
November 2016	Workshop with partners	set of KPI indicators
November 2016 – February 2017	Preparation of the questionnaire for the staff travel survey	questionnaire – a draft
February 2017	Working group set-up and meeting, comments and editing of the questionnaire for the staff travel survey, preparations of informative campaign	questionnaire – final version
February 2017	Preparation of a template for the Transnational report on two-pillars modal split	D.T3.1.1.: template
March 2017	Train the Trainer Workshop in Vienna	Workshop on how to develop the mobility plan
March-July 2017	Stakeholder meetings and workshops in each participating municipality	Getting the stakeholders involved into the mobility planning process
April 2017	Start of the information campaign among employees, staff travel survey	raw data

January-April 2017	Preparation of materials on developing mobility plans for municipalities (training materials, handbook, …)	D.T2.3.1: Training material in national languages for conducting the capacity building for municipalities; D.T2.1.1: Handbook on developing, monitoring and evaluation the mobility plan
April-October 2017	Regional trainings for municipalities on tools for mobility plans	7 trainings
April-August 2017	Summarisation the data obtained from the staff travel survey, evaluation of the survey data, processing of the report about the initial travel behaviour of the employees, proposal of action plan	D.T3.1.1.: 1st transnational report on 13 two-pillars modal split on before measurement
September 2017	Working group meeting, approval of the action plan	confirmation of the action plan, definition of the target values of the indicators
October 2017	Preparation of the report on the regional trainings	D.T2.3.2: Transnational report on seven regional trainings for municipalities on tools for mobility plans
October – 2017	Finalization of the mobility plan	completion of the mobility plan draft
December 2017 – June 2018	Stakeholder meetings in each participating municipality	Talking with the stakeholders about the pilot action
December 2017 – March 2019	Awareness raising campaign	
October 2017-April 2019	Gradual implementation of the measures proposed by action plan	Measures implementation
December 2017 – June 2018	Stakeholder meetings in each participating municipality	Talking with the stakeholders about the pilot action and implementation of measures
December 2017 – March 2019	Awareness raising campaign	campaign
April 2018	Staff travel monitoring survey	initial monitoring research
April – May 2018	Evaluation of the new survey data, update of action plan	D.T3.1.2: 2nd transnational report on 13 two pillars modal split on during measurement
May 2018	Working group meeting, approval of the updated action plan	Updated action plan
April 2019	Staff travel survey, evaluation of the survey data, processing of the report about the travel behaviour of the employees.	D.T3.1.3: 3rd transnational report on 13 two pillars modal split on after measurement
April-May 2019	Summarisation the data obtained from the staff travel survey and municipalities. Evaluation of implemented measures, changes in modal split and KPIs.	D.T2.2.2. Monitoring and evaluation report on testing the pilot actions

3. DATA COLLECTION

The information about the initial state of the employee mobility will be retrieved from the findings of two data-collecting strategies.

3.1. Quantitative research

3.1.1. Questionnaire research

The questionnaire (Annex 1) will be prepared in both electronic and paper version. The electronic version will be based on the Google Forms application and will be available in all project partners' national languages (translated by each partner). Target group of the research will be all employees of given institution. Expected return rate of the questionnaire is at least 20 % as set in the section 4. The municipalities should spread the questionnaire with help of their HR departments via e-mails, intranet or other ways how they usually communicate with the employees, suitable for them.

Key outputs of the questionnaire research:

Modal split

- summarized data on employees
- data filtered by source area

Transportation accessibility

- time accessibility to a workplace from various locations, access time differences between individual means of transportation (isochrone map)
- irregularity in transportation (frequency of delays, traffic congestion)

Parking

- parking locations employees usually use
- time losses associated with searching for a parking spot

Willingness to change the travel behaviour

- specific circumstances under which employees would consent to travel and commute in a more economical/environment-friendly manner
- key criteria in choosing the means of transportation to work

Carpooling

- a report on carpooling support, the (im)possibility of carpooling (selecting possible source areas)

Business travel

- frequency of business travels and usual means of transportation

The questionnaire can be adapted by each municipality and checked if every question is relevant. For example some municipalities can add specific parking locations as possible answers for the question no. 4. or they can change the possible answers in question no. 23 according to the options that are relevant for their municipality according to their PT provider. The municipalities can also add a few questions which are important for their knowledge.

3.1.2. Web Application

Another source of evaluation data from pilot actions, which is to be created within the scope of this project, is a web/mobile application. Via this application we can gather information about its users' everyday commuting to work. Reciprocally it would, in an entertaining manner, provide the users with the account of their travel behaviour and hence with facts they may not have been aware of before. With the use of modern smart technologies it is now possible to collect the necessary data continually and automatically.

The employee motivation for using the application and also for the behavioural change operates on several levels. Users can be motivated by finances – they can save money by e.g. leaving their car at home and carpool. Another motivation can be ecological – by the change of the behaviour we can calculate the amount of CO_2 emissions and other chemical substances and thus assess the environmental impact of transportation.

3.2. Qualitative research

Another source of information, directly following the questionnaire research, is a series of **interviews with individual employees**. The objective of this qualitative research is not only to survey the present day state of things. It also aims to gain insight into the dynamics of motivation to change one's behaviour or alter one's needs. The interviews would be held with those employees who submitted the questionnaire with their contact details and who by doing so agreed to participate in further research. Ideal samples, vital in studying and evaluating the issue of transportation, are those covering various means of transport.

Where a strategic reward system can be designed and applied, active participation of employees (in researches, interviews, etc.) may be rewarded. In case the budget is limited and cannot cover such reward system, employees' involvement may still be compensated – respondents may enter a competition with three randomly chosen winners and be motivated by the possibility of being selected and rewarded.

Naturally, the formerly discussed compensations do not necessarily have to be cash rewards. The authorities may, with respect to their agency, distribute locally-relevant service vouchers (e.g. a pass to the swimming pool which is managed by the authorities).

The members of the **municipal authorities' council** also provide valuable **qualitative data** which may be obtained from interviews as well as from work meetings or filled-out questionnaires. The forms provided to the regular stuff and the chief authorities can be analogous as far as topic is concerned, major difference would lie within the perspective from which the respondents view this issue (in case of the council's members this perspective would be that of an authority).

3.2.1. Guide for qualitative research

Depending on the size of the institution an appropriate number of interviewees will be chosen. The minimum of interviewees will range between 2 and 6. Number of institution's employees	Minimum number of interviews	Optimal number of interviews
up to 50	2	5
50 to 100	4	7
101 and more	6	10

A structure for interviews will be provided in order to achieve the minimal standardisation. During February and March 2017 a structure will be developed and tested. The final structure will contain a set of broad questions or rather topics to guide the interview. Final structure will be shared with project partners in beginning of April 2017. Additional topics may be added according to the needs or invention of project partners.

The interviews are understood as a data source for subsequent analysis. Such analysis requires a data preparation. Basically, there are several ways of to process interview data:

1. Making notes during interview. Interviewer listens to a interviewee and write down all answers, selected answers or whatever he or she decides. The data for analysis consists of such notes.

2. Recording interview. Interviewer listens to the interview recording, makes notes and produces quasi-transcription of the interview. Quasi-transcription is then analysed.

3. Recording interview and full transcription. Interview is recorded and then fully transcribed. Full transcription is the analysed document.

The most desirable data production method is the third option, however the less demanding methods (1st and 2nd) may be chosen. Project partners are required to provide text documents (notes, quasi-transcription, full transcription) for analysis stage.

4. KEY PERFORMANCE INDICATORS (KPIs)

4.1. Thematic indicators

4.1.1. Project result indicators

INDICATOR	MEASUREMENT UNIT	TARGET	EXPLANATION
Number of institutions adopting new and/or improved strategies and action plans	Institutions	13,00	13 mobility plans will be elaborated for 13 public institutions such as city hall and public institutions established by city hall. Working and advising to city administration and local decision maker will ensure enactment of plan on city council.
Number of institutions applying new and/or improved tools and services	Institutions	17,00	During project at least 13 public institutions will apply transferable methodology for mobility planning process. In capitalizing phase at least 4 new institutions will be activated by PPs to apply integrated smart mobility toolkit and start plan procedure.
Amount of funds leveraged based on project achievements	EUR	1.300.000,00	As results of mobility plans cities will be able to gain funds for further improvement of e.g. mobility management and public transport measures foreseen in action plan and by saving CO_2 and reducing travel costs for about 0,1M € per 13 pilot institutions
Number of jobs created (FTE) based on project achievements	FTE	1,00	Rough estimation foresees that work positions such as mobility related experts will be created only in Litoměřice city. Therefore they plan to hire 1 mobility expert.
Number of trained persons	Persons	300,00	Project foresees 3 different training actions: -train the trainer among PPs (20). -7 trainings for pilot cities (at least 20 per city) -7 trainings for other stakeholder and cities / municipalities (at least 20/PP).

4.1.2. Mobility change indicators

INDICATOR	MEASUREMENT UNIT	TARGET	EXPLANATION
Number of promotional materials (leaflets, giveaways) disseminated	Promotional materials	7000,00	Project giveaways and leaflets will be disseminated in order to raise the awareness of municipalities' employees of the impact of their mobility behaviour and to motivate and achieve changes in behaviour. Calculation: 1000 promotional materials per country (1000 x 7 = 7000).
Number of implemented measures proposed in mobility planning process	Implemented measures	26,00	The municipality can change the mobility behaviour of its employees by implementing measures promoting sustainable mobility (campaigns, infrastructure changes, new internal rules, seminar etc.). Calculation: 26 implemented measures per 13 pilot institutions.
Number of e-vehicles obtained or owned by the municipality or its employees.	E-vehicles	10,00	Usage of e-vehicles (e-cars, e-bikes) can have a big influence on lowering CO_2 emissions and contributing to the project objective. 10 e-bikes are planned to be purchased in municipality of Litoměřice.
The percentage increase of sustainable mobility modes	%	20,00	Using travel survey three times during life-span of the project modal split for involved institutions will be estimated. The project's goal is up to 20% increase of number of trips made by sustainable mobility modes (cycling, walking, public transport, carpooling etc.).
Number of people answering the questionnaire	Person	1116,00	Number of people filling in the questionnaire can show us the investment of the people in the topic of sustainable mobility. Everyone who pays attention to the questionnaire is induced to think about their mobility and possible change. Calculation 20 % of 5581 employees at pilot action institutions is 1116 person.
Number of letter of commitment	Letter of commitment	13,00	Each institution which will develop mobility plan for its employees should sign a letter of commitment which expresses their willingness to adapt this plan as internal document or strategic solution. Calculation: 1 letter of commitment per 1 mobility plan.

4.2. Communication indicators

INDICATOR	MEASUREMENT UNIT	TARGET	EXPLANATION
Unique visits to the project website (digital reach)	Number of stakeholders reached	300,00	Website will be updated regularly and promoted on every project event and all promotional materials. We expect up to 300 visits per month. Information of website will be launched to all networks' municipalities through local and regional newsletter.
Participants at project Events (physical reach)	Number of stakeholders reached	660,00	It is foreseen that at least 60 participants per involved country will attend events such as seminars and trainings, at least 100 for joint international event and at least 20 per country for dissemination events.
Event participants satisfied with information provided (satisfaction with information)	Percentage of stakeholders satisfied	80,00	LP will prepare feedback measurement form to evaluate the percentage of satisfied stakeholders who participated in project events. The foreseen value is about 80 % of all stakeholders satisfied participated in all involved regional's events.
Joint communication activities implemented with external stakeholders (external cooperation)	Number of communication activities	30,00	In WPC there will be many individual consultations with external cities. Additionally many in-house e-newsletters, newspaper, local media, local city e-updates, international public platforms (e.g ELTIS) for example will spread idea of MOVECIT.

Annex 1 – Questionnaire for employees of the municipalities