





Cali Sparks, West Sussex County Council

THE STANDARDISED ASSESSMENT METHODOLOGY (SAM)



The Standardised Assessment Methodology (SAM)

- What is SAM?
 - Why monitor travel plans?
 - The SAM process
 - Some examples of recent SAM surveys
- 

What is SAM?

SAM is the Standardised Assessment Methodology for monitoring the effect of Travel Plans.

SAM uses the TRICS multi-modal data collection methodology with added features.

SAM is being incorporated into planning agreements by County Councils.



What is SAM?

Why do travels plans
need to be monitored? ▶

The SAM process

Costs

Case studies ▶

FAQs

Contact information

Download leaflet

TRICS® homepage

Want to know how effective
your travel plans are?


sam

What is SAM? Standard Assessment Monitoring

SAM has been developed by TRICS® as a system of monitoring and assessing the effectiveness of travel plans. It uses long established TRICS® methods of multi-modal data collection enhanced with comprehensive information on travel plan details to produce robust travel plan survey results.



Why monitor travel plans?

- Monitoring is a key element of a travel plan
 - Prevention of a “Static Document”
 - PPG13 and DfT Guidance on Transport Assessment emphasise importance of travel plans being monitored
 - Monitoring can assist in the success of future travel plans
- 



The SAM process

- Planning condition requires use of SAM monitoring
- Baseline surveys and surveys in years 1, 3 and 5 of travel plans follow
- Data collection methodology uses TRICS multi-modal principles plus additional features

Suggested travel plan condition

"Prior to the commencement of development the applicant shall submit for the written approval of the Local Planning Authority a Travel Plan in accordance with the aims and objectives of PPG13 (March 2001), the Government White Paper (July 1998), [Local Authority specific Travel Plan guidance], and in general accordance with the 'Heads of Travel Plan' document (if appropriate, specify)."



Suggested travel plan condition

"The applicant shall implement and monitor the approved travel plan in accordance with [Local Authority specific Travel Plan guidance], and for each subsequent occupation of the development thereafter maintain and develop the travel plan to the satisfaction of the Local Planning Authority".

**Suggested Travel Plan/Statement
Heads of Terms document or Section
106/278 Clause – available at
www.trics.org**



Timelines for SAM surveys

- Baseline survey (prior to commencement of Travel Plan)
- First post-TP survey undertaken in Year 1 of the life of the Travel Plan
- Follow-up surveys to take place in Year 3 and Year 5 of the Travel Plan
- Consistent methodology used



The SAM data collection methodology

- Standard TRICS multi-modal methodology applies to SAM surveys
- Site visits and survey specifications subject to TRICS conditions
- Additional Travel Plan data section within the TRICS database for SAM sites
- “Journey Purpose” counts included for Employment SAM sites

Site Reference KC-02-A-05

MULTI-MODAL

Area KENT

Land Use 02 - EMPLOYMENT A - OFFICE

Region SOUTH EAST



Print



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Main Details

Changes in Site Environment and Circumstances

Cycling

Car Sharing

Car Parking Management

Financial Incentives

Public Transport

Shuttle Bus

Travel Plan History

Date of Travel Plan implementation
September 1999Has the Travel Plan been accredited, or received an award recognition of its quality, from either a national body such as ACT or a local authority
Yes

Travel Plan Coordination

Is there a Travel Plan co-ordinator - a member of staff whose job it is to manage the implementation of the Travel Plan
YesIf YES to the above, do they work on the Travel Plan full time or part time?
Full time

Travel Plan Target Group

Main target markets for the Travel Plan

Staff Target group

Visitors Not a target group

Customers Not present

Students Not present

Patients Not present

All Site Users Not a target group

Other

Pre-Travel Plan Mode Split

Was modal split data obtained before the introduction of the Travel Plan?
Yes

If YES, when? June 1999

Vehicle Occupants 79 %

Cyclists 1 %

Public Transport Users 8 %

Pedestrians 12 %

Travel Plan Modal Split Targets

Did the Travel Plan identify mode split targets?
Yes

If YES, when? June 1999

Vehicle Occupants 63 %

Cyclists 5 %

Public Transport Users 17 %

Pedestrians 15 %

 Calculate
  Journey Purpose Split
  Copy Data
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 Total Vehicles
  Cycle
  OGV
  Vehicle Occupants
  Pedestrians
  PTU
  Bus Passengers
  Coach Passengers
  Train Passengers
  Total People
  Journey Purpose

Definitions

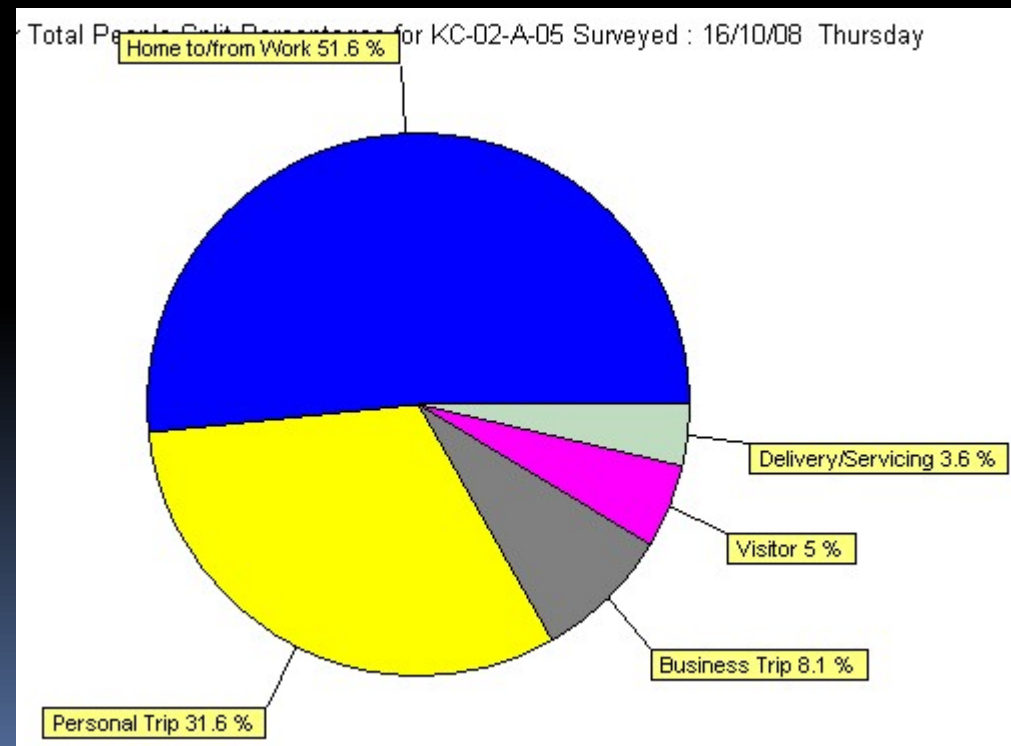
JOURNEY PURPOSE FOR TOTAL PEOPLE

Time	INBOUND						OUTBOUND						Totals
	Home to Work 1182	Personal Trip 677	Business Trip 175	Visitor 123	Delivery/ Servicing 71	Total People 2228	Work to Home 1080	Personal Trip 708	Business Trip 180	Visitor 98	Delivery/ Servicing 87	Total People 2153	
00:00-00:30													
00:30-01:00													
01:00-01:30													
01:30-02:00													
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04:30-05:00													
05:00-05:30													
05:30-06:00													
06:00-06:30													
06:30-07:00													
07:00-07:30	44	1	1	0	4	50	1	0	0	0	0	1	51
07:30-08:00	140	3	1	0	1	145	0	0	1	0	5	6	151
08:00-08:30	237	0	3	0	5	245	0	2	5	1	4	12	257
08:30-09:00	361	0	3	2	5	371	4	1	2	0	5	12	383
09:00-09:30	105	0	1	2	5	113	0	2	4	2	4	21	134

Additional data features add to overall value of SAM data

Descriptive and quantitative information on Travel Plan elements enhance are designed to give TRICS users a greater understanding of SAM survey sites.

Journey Purpose element of survey count adds a new option for multi-modal survey analysis.



Examples of recent SAM surveys

- Butlins, Bognor Regis
- Wealden District Council, Hailsham
- University of the West of England, Bristol
- Cornwall College, Camborne
- Park 25 Residential Development, Redhill
- Billingshurst Leisure Centre, Billingshurst
- Further surveys currently underway/planned

