

Low Emission Hub: Case Study Drafting and Design Notes

This document provides notes and guidance for drafting case studies for upload to the Low Emission Hub. Since the Hub is a new platform, trial and experimentation during its first phase of use will help to refine and add detail to these notes and also to provide best practice examples/templates. In the meantime, these notes are not intended to be entirely prescriptive and users are encouraged both to use their initiative and also to provide feedback on their experiences.

The Hub is designed to support a range of different types of case studies, each of which may be described at differing levels of detail. Three types are presented in these notes: - Basic (Type I), Core (Type II) and Detailed (Type III).

In addition, a suffix 'Q' is added where one or more formal indicators are added (e.g. Type II-Q). Guidance for adding quantitative indicators is under preparation, in the meantime if you wish to use this functionality within the Hub, then please contact Rob@green-sphere.co.uk.

Increasing the level of detail or degree of quantification does not necessarily lead to better or more useful case studies. Factors such as quality, clarity and transparency are also relevant. So the 'level of detail' categories are intended to help guide the user to select an approach, which is most appropriate for them. The associated guidance is intended to encourage standardisation and comparability across different authors and case studies.

The Partnership welcomes relevant good quality case studies from all users, though it does reserve the right to edit submissions or to reject them. Edited submissions will only be uploaded with subsequent approval from the submitting party.

The Partnership welcomes feedback on all aspects of the Hub and also on these guidance notes.

For the latter, the following questions are of particular interest:

- (a) Are any of the drafting instructions unclear?
- (b) Which aspects of the requested information are non-standard or most difficult to provide?
- (c) Is there any key or important information not asked for?
- (d) Are any of the word limits unduly easy or difficult to meet?

Please send comments and enquires to Jess@green-sphere.co.uk



1 Basic Case Study

Type I level of detail

1.1 Name

Case study title. Formatted as “Name (Subtype)”, where ‘Name’ is unique and descriptive, and ‘Subtype’ reflects the category of case study, where possible chosen from the list in Table 1 (see end of document).

1.2 Type

Identify type of case study:

- Framework: corporate plans, policies, systems or guidance that define the council approach on air quality and emissions management. The most common framework case studies are: Air Quality Strategy, Authority wide Low Emission Strategy, Air Quality Action Plan, Public Health Policies/Guidance, Planning Policies/Guidance, Procurement Policies/Guidance, and Local Transport Plan.
- Fleet: based around managed fleets (e.g. council owned fleet)
- Site: based around managed sites (e.g. a new development)
- Area: based around a geographic area and not easily defined as a site or a fleet (e.g. town centre, arterial corridor)

(NB If you are unsure about which type to select for a given case study, then note this in a comment in the status field for the moderator to address prior to publication).

1.3 Main Actor

Enter the organisation or entity most closely associated or responsible for the action, which the case study described (e.g. often this will be: Fleets – the operator; Sites – the developer and Area/Framework – the Authority/Group)

1.4 Authority/Group

Note: Hub input box currently reads: ‘Authority’ not ‘Authority/Group’

Enter the local authority or group which is developing the case study.

Groups maybe be Local Authority groups (e.g. West Midlands), or non-governmental (e.g. Carplus)

Groups wishing to use the Hub to develop case studies should contact the Partnership to discuss their needs.

1.5 Location Type

Note: Hub input box currently reads: ‘Location’ not ‘Location Type’

Select most appropriate location type from: Rural, Market Town, City, Metropolitan Area, Mixed or Regional.

(NB location type is for the specific action(s) described in the case study, not for the Local Authority or Group)

1.6 Town/City

Enter the closest city, town or village where the case study is located.

(NB for a broad ranging case study, select an appropriate geographically or administratively central place)

1.7 Postcode

Enter the post code, at which you wish the case study to be located on map search.

1.8 Headline

[max 150 words]

What does the case study cover? What does it tell us? Why is it interesting?

(NB this is the ‘elevator pitch,’ make it short, specific and to the point)

1.9 Status and History

Note: Hub input box currently reads: ‘Status’ not ‘Status & History’

- Provide outline process/timescale for work, for example:

Policy: proposal (mm/yy) consultation (mm/yy-mm/yy), adopted (mm/yy)

Planning: application (mm/yy), decision (mm/yy), commencement of works (mm/yy), occupation (mm/yy)

Fleet: Review (mm/yy), business case (mm/yy), procurement (mm/yy), deployment (mm/yy-mm/yy)

Generic: design initiated (mm/yy), assessment completed (mm/yy), action agreed/approved (mm/yy), action commenced (mm/yy), action completed (mm/yy), post-implementation appraisal (mm/yy)

- Also add brief plan/timetable for developing, refining or otherwise updating the case study in future.

(If no intention to revisit, then simply say so, e.g.: ‘case study is complete, no plans to revisit’)

- You may also add brief notes/ queries to the moderator, for them to consider prior to publication (though note that extensive or detailed correspondence should be better undertaken via email)

1.10 Action Types

In order to enable key search functions, it also necessary to define one or more action types for the case study. You can do this via the ‘Actions’ tab on the upload case study section of the website.



2 Core Case Study

Type II level of detail

2.1 Scope [max 150 words]

Define the scope of the case study. This could include the following information for the various case study types:

Fleet

- **Organisation:** name, type of organisation
- **Baseline fleet:** categories, number of vehicles, duties, mileage
- **BAU:** describe 'business as usual' fleet replacement/management strategy
- **Documents:** reference documents

Site

- **Site:** location, size, prior use
- **Development:** list of land use / function (+ground floor area)
- **Surroundings:** other land uses, access
- **Documents:** reference documents and/or link to planning portal / public record

Area

- **Area:** name, boundaries of 'area' considered
- **Emission target:** what does the measure apply to, which emission sources are targeted
- **Documents:** reference documents

Framework

- **Framework:** name, type of measure
- **Geographic extent:** where does the measure apply
- **Emission target:** what does the measure apply to, which emission sources are targeted
- **Documents:** reference documents

2.2 Harm – Action – Benefit Statements

Harm

[max 150 words]

Precisely and concisely describe the 'harm' (i.e. negative impact, pressure or risk), which the case study action is intended to address. Include headline statistics (i.e. quantitative metrics) where these are available / informative (note: quantitative information can also be uploaded as formal indicators – see section 3)

Action

[max 150 words]

Precisely and concisely describe the action, which was taken, planned or proposed to help address the harm described above. Include performance criteria/standards where known. Provide summary financial costs, if known. (Note: quantitative information can also be uploaded as formal indicators – see section 3)

Benefit

[max 150 words]

Precisely and concisely describe the benefit(s), which has been demonstrated, estimated or postulated. Include headline indicators (i.e. quantitative metrics) where these are available / informative. (Note: quantitative information can also be uploaded as formal indicators – see section 3)

2.3 Appraisal [max 150 words]

Summarise state of progress and any key learnings, include references/links to relevant appraisal studies or reports. Also include a process/timescale for any ongoing monitoring or appraisal work.

3 Detailed Case Study - Context

Type IIIa level of detail

Note: If previously uploaded within the 'user details', then generic information is automatically added for the asterisked fields. This can be left unchanged, amended or deleted as required for the specific case study.

3.1 Local*

Add local description setting out the context for the case study (e.g. will help other users understand how the case study is similar to their situation). Information could include: Administration (size/type of authority), Local Area (location, layout, surroundings), socio-economic (incl. employment, services, amenities), physical (geography / topology) and transport (links / infrastructure).

3.2 Emissions*

Add local information, which sets the Air Quality/emission context for the case study, potentially covering: sources (incl. information on fleet/component contributions), greenhouse gases / air pollution (emission stats/trends), air quality (Air Quality Management Areas and exceedances), health impacts (stats/trends) and any key references (incl. Air Quality Review and Assessment and Emission Assessment reports).

3.3 Policy*

Add information, which sets the local policy context for the case study – e.g. will usefully note the primary controlling policy (or other) documents relevant to the design, approval and implementation of the work described.

3.4 Assessment Notes

Briefly describe the overall approach and component technical assessment(s) which were undertaken, are planned (or would ideally be undertaken) to support the action described within the case study. Make reference to standard methods where known/available. Provide a reference list of underpinning assessments undertaken or planned (with dates/status). May usefully include sections on: Approach, Method Reference, Method Outline, Definition / Conventions, Additional Notes and Documents.

3.5 General Notes

Use this section for any other information that is relevant to understanding the context, management, implementation, reporting or appraisal of the work described in the case study, or also in the compilation of the case study itself.

3.6 Supporting information

Upload documents relevant to the case study. Only one image per case study can be uploaded, uploads of other files are unlimited. A planning online reference can also be added if relevant and available.

3.7 Comments

Comments can be submitted by any registered user directly from case study view. This function may be used simply to provide feedback to the Low Emission Partnership, or else to suggest additions, caveats or amendments to the case study in question. The moderator will review this feedback and may add notes and comments as considered appropriate.



4 Detailed Case Study – Action Detail

Type IIIb level of detail

Where the action statement encompasses a package of related measures, the Hub can also hold information for each component action. You access these entry boxes by clicking on the 'display more fields' button in the 'Actions' tab of the case study upload section of the website.

4.1 Action Type

Select from a drop down list (Table 2). 'Other' category is also available.

4.2 Action Name

Short descriptive name of action

4.3 Action Definition

Short description to describe what physical change the intervention creates in terms of infrastructure, fleet/vehicles composition, operations and/or transport activity.

4.4 Action Status and History

Note: Hub input box currently reads 'Status' not 'Status & History'

Enter progress and current status including (where relevant): work initiated, assessment completed, action agreed/approved, action commenced, action complete (provide dates as mm/yy).

4.5 Action Mechanism

Note: would more logically come after Action Definition

Provide a short description of how the 'effect' translates into air quality/ emission benefits, including performance criteria, other evidence and/or assumptions regarding nature, scale and penetration of the change, which is relevant to assessing or estimating the associated emissions and air quality benefits.

4.6 Capital Cost Description

Define headline capital cost metric (inclusions/assumptions etc.) and include any information on cost breakdown

4.7 Capital Cost

Provide headline capital cost figure in £s

4.8 Operating Cost Description

Define headline operating cost metric (inclusions/assumptions etc.) and include any information on cost breakdown

4.9 Operating Cost

Provide headline operating cost figure in £s

**Table 1: Case Study Types and Subtypes**

Type	Sub-Type
Framework	LES/LEZ
	LES/LEZ development
	Planning Policy/Guidance
	Procurement Policy/Guidance
	Public Health Policy/Guidance
Site	Planning Condition/Agreement
	Travel plan
Fleet	Fleet Recognition & Assurance
	Fleet Management / Operations
	Freight Management
	Grey Fleet Management
	Driver Training & Support
	New Vehicles / Retro-fit
	Vehicle trials
Area	Behaviour Change
	Congestion Charge
	EV Infrastructure
	Share / Hire
	Other - Area

Note

These subtypes are a simple categorisation of the main case studies currently sitting on the Hub.

They are similar to the action type classifications of Table 2, but differ in that only one subtype is selected for each case study. The '1 to 1' relationship means that there will inevitably be a degree of ambiguity or overlap in some cases. However, this has been kept to a minimum for the current case studies, by careful choice of subtypes; and will be reviewed on a periodic basis. If you are unsure as to which sub-type to use, or if you feel that none suitably apply, please select the best one you can and add a note to this effect in the status field. The moderator will resolve the issue as part of pre-publication checks.

**Table 2: Case Study Actions**

Action type	Action subtype
Behavioural change	Travel Plan
	Travel Advice Centre/Manager
	Travel Smart/Personalised Travel Campaign
	Travelwise/Behaviour Change Campaign
Financial Support	Contribution for strategic investment (S106/CIL)
	Subsidy scheme for low emission vehicles
	Subsidy for public transport services
Fleet actions	Fleet Policy Review
	Fleet Performance Management
	Driver Skills Development
	Procurement strategy
	Green Fleet/ Low Emission Vehicle Investment
	Vehicle Modification and Maintenance
	Fleet Vehicle Replacement
Freight	Freight Quality Partnership
	Delivery and Servicing Plans (DSPs)
	Consolidation initiatives
Infrastructure	Cycling/walking Infrastructure
	Public transport infrastructure
	Electric vehicle infrastructure
	Biomethane infrastructure
	Other low emission vehicle Infrastructure
	IT infrastructure to support tele-working/shopping
Policy / Framework	Policy or Framework Strategy / Implementation
Public transport	Quality Bus Partnership
	Taxi Emissions Strategy
Regulation	Anti-idling campaign/regulation
	Speed Enforcement
	Traffic Management Scheme
	Emission Based Parking Allocation
	Low Emission Zone
	Access control
User charging	Congestion Charge
	Emission based parking charge
	Emission based user charge
Vehicle sharing	Bicycle/E- bike rental scheme
	Car clubs
	Low Emission car club
	Low Emission Taxi Rank

Note: Case Studies may describe a package of measures, which includes multiple action types.