

# Travel Plan Guide for Developers



**July 2011**

## Notice

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### Transport Planning Advice Sheets [www.goucestershire.gov.uk/tpguidance](http://www.goucestershire.gov.uk/tpguidance)

1 Car Clubs	(Revision 1. March 2006)
2 Individualised Travel Marketing	(Discontinued; see sheet 7)
3 Cycle parking	(Discontinued; see Cycle Infrastructure Design)
4 Bus Stop specifications and infrastructure	(Revision 1. August 2006)
5 Accessibility	(Revision 1. November 2006)
6 Soft Measures and Incentives	(Discontinued; see sheet 7)
7 Residential Travel Plans	(Revision 1. September 2009)
8 Business Travel Plans	(Revision 1. January 2011)
9 Template S106 Agreements	(Revision 1. January 2011)

## Glossary of terms and abbreviations used in this guidance

Table 1

Abbreviation	Term	Meaning
CSV	Central Severn Vale	The Central Vale of Gloucestershire, explicitly, in this context, the Cheltenham and Gloucester "travel to work area" as identified in the Gloucestershire Local Transport Plan 2; see figure 1.10
GCC	Gloucestershire County Council	Gloucestershire's local highway authority for strategic planning and development control.
LA	Local Authority	The local government offices responsible for transport and/or planning in the area (in this case Gloucestershire County Council or one of the 6 District authorities; Cheltenham, Cotswold, Forest of Dean, Gloucester, Stroud or Tewkesbury).
LTP2	Gloucestershire Local Transport Plan 2	A statutory document covering the years 2006 to 2011. LTP2 is a delivery programme designed to achieve targets reflecting national, regional and local transport priorities.
LTP3	Gloucestershire Local Transport Plan 3	LTP3 sets out the transport strategy for the County from 2011 to 2026. <i>"Providing a safe and sustainable transport network within Gloucestershire"</i> <a href="http://www.goucestershire.gov.uk/ltp3">www.goucestershire.gov.uk/ltp3</a>
SOV	Single Occupancy Vehicle	A motorised vehicle occupied by the driver only.
SPD	Supplementary Planning Document	A Supplementary Planning Document is a Local Development Document that may cover a range of issues, it provides further detail of policies and proposals in a 'parent' Development Plan Document.
TA	Transport Assessment	A TA is a comprehensive and systematic process that sets out transport issues relating to a development. <a href="http://www.dft.gov.uk/pgr/regional/transportassessments/guidanceonta">www.dft.gov.uk/pgr/regional/transportassessments/guidanceonta</a>
TP	Travel Plan	A document containing a package of measures produced by an organisation to incentivise individuals to use alternatives to single-occupancy car-use (see chapter 3 for further guidance).
TPAS	Transport Planning Advice Sheet	These Advice Sheets support the guide and are available at <a href="http://www.goucestershire.gov.uk/index.cfm?articleid=102614">www.goucestershire.gov.uk/index.cfm?articleid=102614</a>
TPC	Travel Plan Coordinator	An onsite or site specific officer (preferably in a senior position), who leads the coordination, implementation and management of the travel plan (see chapter 8 for further guidance)

## 1. Introduction

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### 1.1 Aims

This guide is intended to support developers and consultants when preparing travel plans to be submitted as part of the planning process. It can also be used by organisations who wish to draw up a Travel Plan to facilitate more efficient and sustainable working practices (Voluntary Travel Plan).

This document aims to:

- outline the purpose and scope of a travel plan, including the document's required content and design (chapters 3 and 5);
- summarise the relevant policy framework (chapter 2);
- list the thresholds/criteria and areas of requirement, including parking requirement and management (Introduction and appendix A.1);
- establish Gloucestershire County Council's expectations with regard to modal split, targets and outcomes (section 1.2 and chapter 5); and
- explain monitoring and review processes (chapter 8).

**N.B. this document is for guidance purposes only; submitted Travel Plans will be assessed on an individual basis by the Local Authority. However, by following the guidance it is likely that you will minimise the need for revisions to be made to the Travel Plan.**

### 1.2 Objectives

The Key objectives of Gloucestershire County Council are to:

- ensure sustainable development;
- community cohesion;
- reduce environmental impact (with regard to both CO2 emissions and physical infrastructure);
- achieve and maintain a 50% SOV mode share in the CSV and
- maintain SOV levels throughout other districts/boroughs.

### 1.3 Key Requirements

#### 1.3.1 Transport Assessment

Key requirements will be assessed and advised by the Transport Planning and Development Coordination Units at Gloucestershire County Council. Contact details: telephone: 01452 42 6793

or <mailto:devcoord@gloucestershire.gov.uk>. For national thresholds please see the DfT guidance on transport assessment;

[www.dft.gov.uk/pgr/regional/transportassessments/guidanceontransportassessments/](http://www.dft.gov.uk/pgr/regional/transportassessments/guidanceontransportassessments/)

### **1.3.2 Travel Plans**

Policy P5f (on page 46) in Gloucestershire's Local Transport Plan 3 (adopted from 1<sup>st</sup> April 2011) states:

*"Travel Plans will be required for new development in accordance with the thresholds in the DfTs Guidance on Transport Assessment. Where a development is deemed to require a travel plan, a legal agreement or unilateral undertaking will be the mechanism used to secure the development of the travel plan and any contributions required to support its implementation."*

The necessity for Travel Plans will be judged on an individual basis, in line with the DfTs Guidance on Transport Assessments. The first point of reference for a decision on any development or extension will be based on the DfTs Guidance.

### **1.3.3 Car, cycle and motorcycle parking**

The level of car parking required will be assessed in accordance with latest Government guidance and local planning policies.

## 1.4 How to use this guide

### 1.4.1 Sections 1 and 2

The chapters 'Introduction' and 'Policy Guidance' give context to travel planning and outline Gloucestershire's aims, objectives and key requirements for your information.

### 1.4.2 Sections 3 and 4

These sections explain what the purpose of the travel plan is and outline the appropriate format for different types of development.

### 1.4.3 Section 5 and 6

'What to include in a Travel Plan' outlines the format and content that will be expected. Without these details the travel plan cannot be effectively reviewed by the authority, the information is necessary in order to appreciate whether the plan will be effective. Section 6 also makes reference to the type of agreements that are likely to be expected and where to find further information.

### 1.4.4 Sections 7 and 8

These chapters go into further detail on specific aspects of the plan, including schemes for implementation and the monitoring and review of the travel plan. Section 8 also details the monitoring role of GCC.

### For further information please contact:

Strategic Planning Unit  
Gloucestershire County Council  
Shire Hall  
Gloucester  
GL1 2TG

Tel: 01452 426896

## 2. Policy Context

### 2.1.1 Delivering Travel Plans through the Planning Process, DfT (2009)

This document is an evolved and updated version of the 2005 *Securing Travel Plans through the Planning Process*; it was published in May 2009 by the Department for Transport and the Office of the Deputy Prime Minister. The guidance sets out how the Travel Plan should be sought through the planning process, with an overview of what a travel plan is and differing types of travel plan for different developments.

Travel plans are an important tool for delivering sustainable access to new development, whatever the use...These travel plan guidelines are intended to set out best practice actions that can be taken to produce high quality, robust travel plans.

The document addresses current policy and describes the role of both the Local Authority and the applicant in facilitating the travel planning process. An important section of the document describes the legal mechanisms to secure effective travel plans through planning applications. The guidance also describes the important role of monitoring to ensure corrective action can be taken when required and that there are effective ways of enforcing the agreed outcomes if needed.

### 2.1.2 Gloucestershire Local Transport Plan 3 (2011-2026)

Policy P5f (on page 46) in Gloucestershire's Local Transport Plan 3 (adopted from 1<sup>st</sup> April 2011) states:

*"Travel Plans will be required for new development in accordance with the thresholds in the DfT's Guidance on Transport Assessment. Where a development is deemed to require a travel plan, a legal agreement or unilateral undertaking will be the mechanism used to secure the development of the travel plan and any contributions required to support its implementation."*

### 3. What is a Travel Plan? Purpose and scope.

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The Department for Transport (DfT) define a Travel Plan as “*a long-term management strategy... that seeks to deliver sustainable transport objectives through positive action.*” Such a plan for example, could include: car sharing schemes; a commitment to improve cycling facilities; a dedicated bus service or restricted car parking allocations. It might also promote flexible-working practices such as remote access and video conferencing.

Recent guidance promotes the use of the ‘outcomes approach’. This approach looks at targets and achievements rather than focusing on specific measures. However, it is necessary to identify measures and incentives in order for Travel Plan submissions to be reviewed.

Gloucestershire County Council will review committed measures and expenditure in the process of agreeing the Travel Plan, but only identify those considered absolutely necessary in legal agreements. Please see Transport Planning Advice Sheets for further guidance at [www.goucestershire.gov.uk/tguidance](http://www.goucestershire.gov.uk/tguidance). Local authorities are advised to develop a clear integrated policy framework for sustainable transport through their local strategies and development frameworks explicitly considering travel plans.

A successful Travel Plan should offer users of the development, whether they are employees, residents or visitors, a choice of travel modes to and from the development site or premises. Travel Plans can be used to address the transport needs of all types of new development which have a significant transport impact. These fall into five broad categories:

- Workplace;
- School;
- Residential;
- Hospital/Healthcare and
- Leisure Travel Plans.

*“A Travel Plan requires ongoing management and maintenance and real engagement with people who occupy the development”*

DfT Delivering Travel Plans through the Planning Process 2009

Developers have to demonstrate how they will contribute to ensuring that peak flows in the Central Severn Vale will not increase above the levels quoted in the Local Transport Plan, or above existing levels in rural areas; preferably decreasing the mode share of single occupancy vehicles.

### **3.1.1 Workplace Travel Plans**

Workplace travel plans are a strategy for managing the travel generated by an organisation, with the aim of reducing its environmental impact. They can focus on both commuter and business travel.

### **3.1.2 School/Education Travel Plans**

A school travel plan is a series of practical steps for improving children's safety on the school journey. A school travel plan works by looking in detail at children's needs and working together with parents, governors, teachers and children to find the right solutions for their school.

### **3.1.3 Residential Travel Plans**

A Residential Travel Plan is a package of measures designed to reduce car use originating from new housing by supporting alternative forms of transport and reducing the need to travel in the first place. They are an important tool to help deliver accessible, sustainable communities and involve meeting the access needs of residents in a new way.

They can also aid good urban design, through encouraging good site accessibility and improving safety. Residential Travel Plans follow the same principles as workplace travel plans.

In general, Gloucestershire County Council will expect to manage and implement Residential Travel Plans. Developers will be asked to provide development details and a baseline sustainability audit; see Section 5.1, 'What to Include in a Travel Plan'.

Contributions will then be negotiated depending on the size and nature of the development; please see Transport Planning Advice Sheet 7 'Residential Travel Plans', available at [www.goucestershire.gov.uk/tguidance](http://www.goucestershire.gov.uk/tguidance). Under these circumstances, GCC would identify the travel plan targets. However, although a contingency may be requested for remedial measures, these would usually be agreed in the initial contribution. The agreement would not usually seek to bond payments or add additional remedial measures as part of the travel plan.

(Employment Travel Plans will generally be written, implemented and funded by the Developer as per the guidance below.)

### **3.1.4 Hospital/Healthcare Travel Plans**

Travel Plans for hospitals and healthcare sites are similar to workplace travel plans, however they also need to consider visitor travel to the site as this is likely to be a significant traffic generator.

### **3.1.5 Leisure Travel Plans**

Leisure Travel Plans are currently in their infancy, the emphasis on this type of travel plan is likely to be on visitors to the site. Leisure developments often have high visitor levels but it is also important to consider the needs of staff in these Travel Plans.

## 4. When should a Travel Plan be submitted?

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This section will outline when a travel plan will be required and what type. Primarily, the type of travel plan should be agreed with the authority, and then submitted with the planning application to ensure integrated approval.

*“Developers are responsible for preparing transport assessments and travel plans to the standard required.”*

**DfT Delivering Travel Plans through the Planning Process 2009**

Before applying for planning permission, developers should make early contact with the Planning Authority, who, in consultation with the Local Highway Authority, can tell them whether a TP will be required, although this will generally be in accordance with the DfT Guidance on Transport Assessment.

N.B. Further to our experience of the benefits of Travel Planning in a variety of developments, Gloucestershire County Council will seek to develop only the most effective of travel plans as per Appendix A.2.

Thresholds are for guidance *only*. Factors such as site access, congestion, level of parking proposed, existing parking pressures, sustainability of location and other material considerations will be taken into account in deciding whether a TP is required.

As both urban and rural environments develop, GCC will further develop the scope of their travel plan remit. Where it is felt by the local authority that the situation dictates, a special measure such as a travel plan may be requested on *any* development.

### 4.1.1 Workplace Extensions

In the instance that an employment site is being extended in order to accommodate a larger floor area and therefore usually an increase in staff numbers, a Workplace Travel Plan will be required.

#### 4.1.2 Multi Occupation of One Site

Numerous small developments on one site may not individually require a Travel Plan. However, the cumulative transport implications may warrant a Plan for the site as a whole; known as a site wide Travel plan.

#### 4.1.3 Speculative Developments

A detailed Travel Plan cannot be produced for a speculative development while it remains 'speculative'. In such cases, an 'interim' Travel Plan should be submitted with the planning application, accompanied by a commitment that a 'final Travel Plan' will be submitted once the site is occupied.

The interim Travel Plan should specify measures to be implemented before development and occupation. It should include a set of draft targets for the share of different types of travel and a timetable for the production of the final Travel Plan and monitoring.

The developer will be responsible for passing the requirement for a Travel Plan on to the occupier whether the occupier rents, leases or buys all or part of the development. The final implementation of a Travel Plan would then be the responsibility of the occupier, although the developer may be expected to appoint the Travel Plan Coordinator to embed the Plan.

#### 4.1.4 Change of use developments

Where an application is submitted for a change of use, a travel plan should be submitted which reflects the new use of the site.

#### 4.1.5 Other considerations

A Travel Plan may also be required for the following developments

- any traffic generating development in, or within 100 metres of, an air quality management area;
- any development that lies within an area (or along a corridor) which has been identified within the LTP for the delivery of specific initiatives or targets for the reduction of traffic, or the promotion of walking cycling or public transport;
- any area, specified within an LDF, where the cumulative impact of development proposals is a cause for concern;
- the provision of a new or extended school and other educational facilities (required by DCFS);
- an extension to an existing development that causes the total travel impact of the site to exceed the GCC travel plan threshold;
- where projects and/or their access routes are adjacent to Sites of Special Scientific Interest, etc.

## 4.2 What type of Travel Plan should be submitted?

### 4.2.1 Full Travel Plan

*“A full Travel Plan should normally be prepared and submitted with the planning application”* A robust plan will include clear outcomes, and the relevant sections as outlined in chapter 5. What to include in a Travel Plan. Full travel plans are appropriate for full planning applications where use and accessibility are known. For some uses e.g. schools only a full TP is suitable.

### 4.2.2 Interim Travel Plan

An interim travel plan would cover all substantive parts of the plan. However, *some* aspects may be provisional, although targets for maximum levels of car trips and a timeframe for the completion of main elements are necessary.

### 4.2.3 Framework Travel Plan

Mixed use developments with multi-occupancy will require a framework TP. This will set overall outcomes, targets and indicators for the site as a whole and is best administered centrally. It should set the parameters for individual sites/users to prepare and implement subsidiary travel plans.

### 4.2.4 Travel Plan Statement

These are likely to be less in depth for smaller developments. They should deal with any issues raised in the transport statement and focus on site measures encouraging sustainable travel, or contribution into a strategic scheme.

### 4.2.5 Area Wide Travel Plan

In some situations it will be essential to consider an area wider than an individual site, for example, where there are a number of developments in an area. It also suits areas where no single site travel plan can effectively respond to the outcomes required.

Table 4.1 – Travel Plan Requirement

Travel Plan Type	Area Travel Plan	Framework	Interim	Full Travel Plan	Travel Plan Statement
Workplace Travel Plan- Occupier(s) known				✓	✓
Workplace Travel Plan- Occupier(s) Unknown			✓		
Workplace Travel Plan- For change of use/extension				✓	✓
Mixed Use Development	✓				
Residential Travel Plan				✓	
School/Educational Travel Plan				✓	
Leisure Travel Plan- Occupier(s) known				✓	
Leisure Travel Plan- Occupier(s) Unknown			✓		
NHS Trust/Health site Travel Plan				✓	

Multi development area	✓				
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## 5. What to include in a Travel Plan

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The Essential Guide to Travel Planning (March 2008) demonstrates what it considers to be best practice when creating and promoting a Travel Plan. The features consist of the following:

- Travel Plan coordinator
- Travel Plan document
- Concrete measures
- SMART targets (Specific, Measurable, Achievable, Realistic, Time-bound)
- Committed resources
- Baseline data
- Monitoring mechanism

Travel Plans vary from site to site; however they should contain a number of key elements which will explain details such as the site's accessibility, travel plan measures, targets and monitoring regimes. A checklist is provided in **appendix A.3** to ensure that all of the requirements of the Travel Plan are met prior to submission. An outline of the contents of each element of the Travel Plan is set out below.

### 5.1.1 Development Details

The planning application number/reference is required for continuity, along with full details of the size and type of the development, including details of any operational activities, opening hours, staffing numbers and the number of proposed and/or existing parking spaces.

The document should provide as much detail as is possible to provide the reader with a clear idea of what the development entails. It should also be apparent what is within the scope of the Travel Plan, for example, if there are numerous units on a business park, is the Travel Plan intended for one or all of the units?

### 5.1.2 Baseline Sustainability Audit

It is important that an appreciation of the site location is presented in the document; in particular access to the site by all modes should be identified. When carrying out a site audit, consideration should be given to public transport, walking, cycling and private motor vehicle in accessing the site.

### 5.1.3 Objectives

Clear objectives should be identified within the document; these could be high level statements which identify key areas to be targeted. For example, to reduce single occupancy car use to the site. Objectives provide a direction through which targets can be created to measure whether progress is being made.

### 5.1.4 Travel Plan Measures

Details should be provided of the Travel Plan measures which are either proposed or have been implemented. The details of the measures should be clearly set out and should include committal language, 'could' and 'should' should be avoided as this forms no commitment to carrying out the measures listed and would not be enforceable. It is however worthwhile to provide ideas or aspirations but these should be in addition to firm measures rather than a substitute for them.

### 5.1.5 Travel Plan Coordinator

It is essential that a Travel Plan Coordinator is appointed to operate the day-to-day running of the Travel Plan responsibilities. It is particularly important that this person is appointed at an early stage in order to influence the design and layout of the development or as a minimum they should be appointed prior to the occupation of the site as they will be able to have a direct influence from the first day that the site is occupied.

The role of the Travel Plan Coordinator includes:

- Promotion and marketing of the Travel Plan and the Travel Plan measures including access by all modes of transport;
- Where applicable liaising with occupiers and supporting them in implementing their Travel Plan;
- Liaison with GCC in implementing the Travel Plan; and
- Submitting annual monitoring reports to GCC.
- Details of the Travel Plan Coordinator including an address, telephone number and email address should be provided in the document. In the case that a Travel Plan Coordinator has not yet been appointed, there should be a commitment within the document to supply the details to GCC.

### 5.1.6 Targets and outcomes

It is imperative that numerical targets and/or outcomes are included within the Travel Plan document as this provides a mechanism to measure the effectiveness of the Travel Plan measures against the objectives identified within the plan.

Targets are usually based upon trip generation and reducing the share of the single occupancy vehicle against baseline figures collected as part of the initial travel survey. It is recognised that in the case of proposed developments it will not be possible to undertake baseline travel surveys at this stage. However, there are a number of alternatives which can be used to gauge likely modal share in the interim e.g. using TRICs modal share data, travel to work census data and, if part of a wider development, by making use of existing data sets which may exist for already occupied units.

It is important that targets are SMART (Specific, Measurable, Appropriate, Realistic and Time bound). Therefore targets need to be based on making a difference to existing modal shares which can feasibly be achieved. It is recommended that targets have a timeframe for completion of between 3-5 years in the short term and 10-15 for longer term developments, in order to allow sufficient time for the Travel Plan to achieve a positive change.

Smarter Choices-changing the way we travel report (2004) states that basic travel plans can expect to achieve a 6-10% reduction in car use whilst travel plans with parking management can achieve reductions of up to 20-25%. This should be considered when developing numerical targets which are both realistic and challenging.

Further outcomes may aim to reduce trip length or other requirements specific to the development site.

### **5.1.7 Baseline Travel Survey**

As mentioned above, it is important that a baseline travel survey is undertaken in order to provide a justification for the numerical targets outlined within the Travel Plan. The survey tends to ask how people travel to work, where they travel from and views about what improvements could be made to encourage a positive change in travel mode.

It is expected that it is endeavoured to maximise the response rate of the travel survey and therefore a minimum response rate will be required which will be agreed with GCC. It is recommended that an incentive is given to encourage responses.

### **5.1.8 Monitoring Strategy**

In order to establish the effectiveness of the Travel Plan a monitoring regime needs to be outlined within the Travel Plan document. Monitoring should be undertaken on at least an annual basis and a commitment to undertaking this should be stated within the document. Annual monitoring should be undertaken for a minimum of 10 years. Monitoring can take the form of staff travel surveys, automated traffic counts (ATCs), cordon survey, household sampling, rider counts, voucher/incentive uptake etc

### **5.1.9 Review**

Review of the Travel plan should take place annually after monitoring is complete. The purpose of the review is to remove unsuccessful incentives and alter their focus/replace them with measures that will achieve the Travel Plan targets.

### **5.1.10 Remedial Strategy**

In the event that the Travel Plan is shown to be underachieving a remedial strategy needs to be outlined, this should consider measures which could help to get the Travel Plan 'back on track'. This may mean an additional expense to the developer as a commitment to making the Travel Plan a success. For example in the event that the Travel Plan targets are not being met, public transport taster tickets could be provided to staff free of charge to encourage use of the bus.

### 5.1.11 Funding Sources

It is important that the Travel Plan is transparent and therefore the proposed funding sources of the Travel Plan and its measures should be clearly outlined. In particular consideration should be given to the cost of funding the Travel Plan Coordinator in addition to the measures and monitoring. Financial contributions and commitments

### 5.1.12 Action Plan

The Action Plan is table of actions and initiatives that pulls together the issues which have been identified. It details the intentions of the travel plan and how change is to be implemented,

The action plan needs to be incorporated into the Travel Plan document, and should outline who is responsible for implementing each task, and a deadline for completion. It may also be useful to attribute any costs to the individual tasks within the table to ensure transparency.

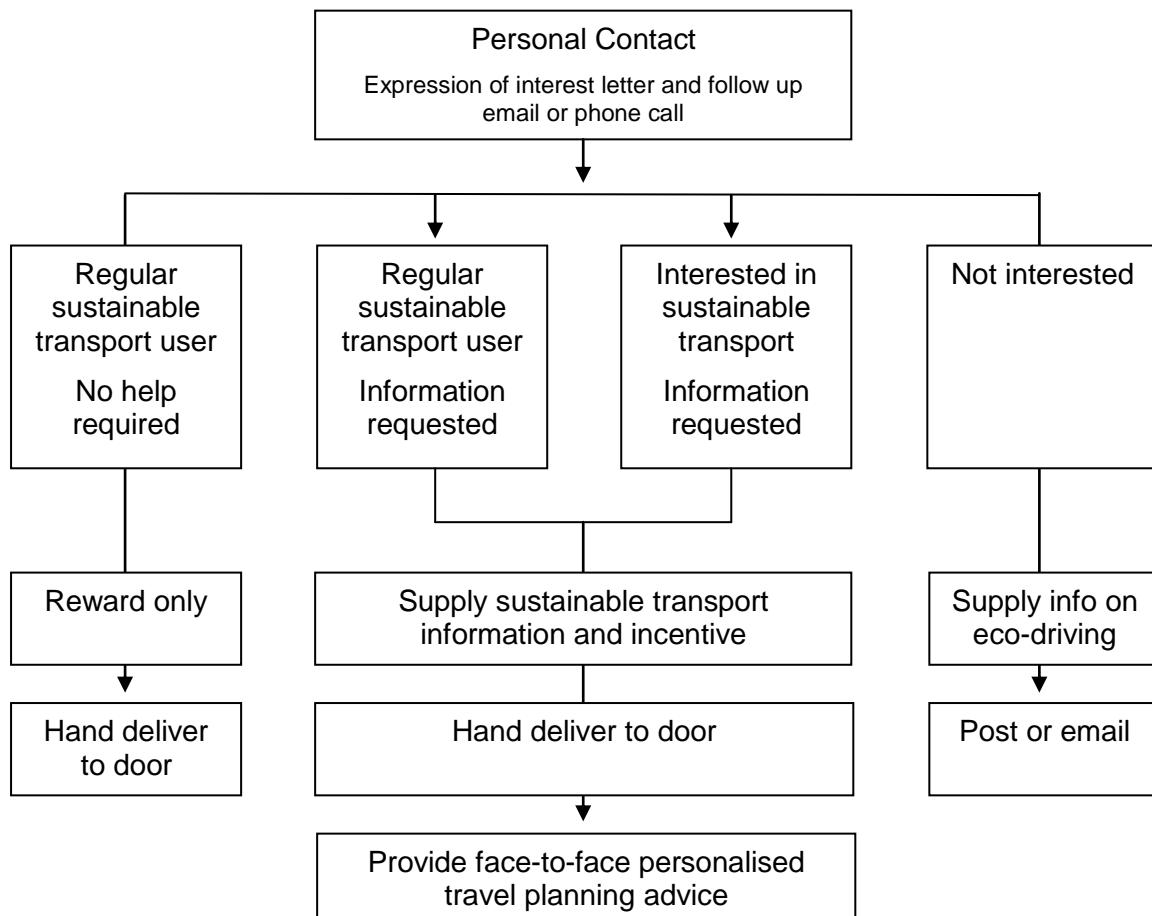
In order to ensure the effective outcome of travel plans, remedial measures should also be outlined within the travel plan document. These will describe what actions will be undertaken should the travel plan not meet its targets.

**Table 5.1 Example Action Plan:**

Action Plan					
Action/Objective	Target	Indicator	Responsible party	Resources	Start/End Date (or frequency)
Physical measures					
Travel Plan Coordinator	<ul style="list-style-type: none"> <li>To employ the TPC on commencement of the development.</li> <li>To appoint the TPC</li> </ul>	<ul style="list-style-type: none"> <li>TPC appointed to provide input to design process.</li> </ul>	<ul style="list-style-type: none"> <li>Developer</li> </ul>	<ul style="list-style-type: none"> <li>£xxx</li> </ul>	<ul style="list-style-type: none"> <li>On commencement of development and for 10 years from occupation.</li> </ul>
Services and facilities					
Marketing and incentives					
Monitoring and review					

### 5.1.13 Residential – personalised travel planning

Personalised Travel planning focuses aims to direct tailored travel information to residents for a variety of journeys such as commuting, leisure, school runs and shopping. Regular sustainable travellers are rewarded and those interested in sustainable alternatives are incentivised with discounts and offers. Information needs to be pitched to the individual, considering such elements as mobility, age and health. The following flowchart depicts the process for engagement:



N.B. Gloucestershire County Council is signed up to the National Cold Calling Protocol, which should be adhered to at all times.

The key principles of the protocol are that personal calls made on people at their homes are required to:

- Be pre-arranged appointments where possible
- Persons must provide identity cards and offer the opportunity for the householder to check their identity
- The purpose of the visit must be explained; and
- Persons must be willing to call back at a later date and time if the householder requests.

## 5.2 Securing the Travel Plan

In order to ensure that the Travel Plan is successfully implemented, it is necessary to legally secure the travel plan. All travel plans which are prepared through the planning process will be secured by either a planning condition or Section 106 agreement. This will be dependent on the individual circumstances of the site. See Appendix A.4 Example Clauses for further information.

## 6. Travel Plan Measures

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This section provides some suggestions of measures that could be implemented as part of the travel plan. These are incentives which can encourage staff to travel by more sustainable modes. This is not intended to be exhaustive and some of these measures may not necessarily be suitable for your organisation, therefore careful consideration should be given as to which are most appropriate for your workplace.

Additionally, there are Transport Planning Advice Sheets attached in Appendices C1-5. The Advice Sheets also contain information on costing. It should be noted however, that these are not definitive figures, but a guide to begin planning costs.

### 6.1 Walking

- Provision of shower, changing and storage facilities
- Taking part in national events
- Provision of walking maps
- Provision of/discounts for outdoor clothing
- Provision of umbrellas at the workplace
- Provision of personal alarms
- Ensuring accesses are laid out to prioritise walkers
- Promoting 'buddying' so that staff have someone to walk to and from work with
- Organising lunchtime walks to improve health amongst employees
- Liaison with the Local Authority to improve access for walkers e.g. crossing points

### 6.2 Cycling

- Provision of secure covered cycle parking
- Provision of shower, changing and storage facilities
- Taking part in National Bike Week
- Establish a Bicycle User Group (BUG) to determine barriers to cycling
- Provision of cycle training
- Encourage experienced cyclists to become a 'buddy' for new or nervous cyclists
- Provide a bicycle kit at the workplace
- Implement a salary-sacrifice scheme for purchase of bicycles and equipment

- Investigate discounts to pass onto staff from local cycle retailers
- Introduce cycle mileage rates for business travel
- Provide cycle route maps
- Provision of pool bikes for staff use
- Free breakfasts for cyclists

### **6.3 Carshare**

- Sign up to [www.carsharegloucestershire.com](http://www.carsharegloucestershire.com)
- Provide a guaranteed ride home in emergencies
- Provide free/guaranteed parking for car sharers
- Provide reserved car parking spaces close to the entrance for car sharers
- Hold a coffee morning to get together potential car sharers to find a match
- Promote car sharing through marketing information

### **6.4 Public Transport**

- Provide discounted public transport tickets
- Provide interest free loans in order for staff to purchase season tickets
- Fund improvements to existing services and infrastructure such as the quality of bus shelters
- Provide up to date public transport information e.g. leaflets, notice board etc
- Hold discussions with public transport operators to determine where any improvements can be made for staff
- Provide a guaranteed ride home for staff in the event of an emergency
- Provide a works bus or shuttle bus for staff
- Advertise any promotions/discounts offered by public transport operators

### **6.5 Car Park Management**

- Implement a fair and equitable parking allocation system
- Implement car park charges to deter those that could use other modes (careful consideration should be given to the type of charges- if annual charge, staff will try to get value from it and drive everyday)
- Developing a car park exclusion zone so that those that have reasonable access to the site by non car modes cannot have access to the car park
- Providing incentives for not parking at the workplace

### **6.6 Reducing the need to travel**

- Provision of tele-conferencing and video-conferencing facilities
- Introduce 'Flexi-time' so that staff can work around their public transport requirements
- Investigate a compressed working week such as a 9 day fortnight
- Introduce a home working policy
- Recruit locally
- Provision of onsite facilities such as canteen (particularly for remote sites)

### **6.7 Fleet**

- Provide a pool car/hire car for meetings and site visits so that it is not necessary for staff to bring their own vehicle to work
- Provision of pool bikes for staff use

- Undertake a review of the company car policy
- Review mileage rates
- Provide driver training to use fuel more efficiently (eco-driving)
- Encourage staff to undertake route planning so that the most efficient route is taken
- Use of efficient vehicles

## 6.8 Marketing and Awareness

- Provide a personalised journey planning service so that staff can understand their travel options to the workplace
- Provide a Travel Information Pack to all new recruits
- Hold regular profile raising events such as National Bike Week

## 6.9 Measures for Interim and Framework Travel Plans

Where occupants are unknown; there are still many measures that can be planned without knowledge of detailed travel patterns. For example:

- car parking restrictions and management;
- public transport improvements;
- facilities for cyclists and pedestrians;
- appointment of travel plan coordinators and/or
- information such as personal travel planning.

## 6.10 Residential Travel Plans

Many of the Travel Plan measures listed above can be applied to residential Travel Plans, however potentially the most relevant measures for residential travel plans are:

- Providing Travel Information Packs to new residents
- Providing residents with incentives such as free public transport taster tickets, discounts off the purchase of bicycles
- Ensuring the design of dwellings allows for cycle parking, this is particularly relevant for apartments

## 6.11 School Travel Plans

*“There is a requirement that, where new schools are built, they have a duty to consider and promote sustainable travel to and from school.”<sup>1</sup> This may require a contribution from the developer towards travel planning.”*

## 6.12 Agreements

A condition and/or obligation may be required under Section 106 agreement, as part of the planning arrangements and/or as a remedial measure if targets are not achieved.

- Contributions may be sought for schemes and projects linked to proposed transport networks as per the Gloucestershire Local Transport Plan or may be more specific to the particular development. As a rule of thumb, developments that will impose upon the network affecting a proposed scheme will make a contribution towards that scheme. There may also be additional, or alternative, site specific contributions. Where requirements are non complex or a simple compliance is necessary, a condition will be used.

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<sup>1</sup> DfT Delivering Travel Plans through the Planning process 2009 Para 3.6

- Where requirements are complex, for example, the development and implementation of a travel plan, a Section 106 agreement will be used.

Please see appendix A.4 Legal Agreements and/or Transport Planning Advice Sheet 9.Template Section 106 Agreements for further information.

## 7. Travel Plan Coordination

In order for the travel plan to be effective and remain an active document there is the need to have a Travel Plan Coordinator in post to implement and maintain the Travel Plan. The primary roles of the Travel Plan Coordinator are as follows:

- Promotion and marketing of the Travel Plan and the Travel Plan measures including access by all modes of transport;
- Where applicable liaising with occupiers and supporting them in implementing their Travel Plan;
- Liaison with GCC in implementing the Travel Plan;
- Liaison with other organisations e.g. public transport operators; and
- Submitting annual monitoring reports to GCC.

A Travel Plan Coordinator must be appointed to support the implementation of the travel plan. Depending on the scale of the development the time input required of the Travel Plan Coordinator will vary. The Coordinator should be located on site and they should be available for staff to talk to them if necessary. It is important that this role is given to someone who is enthusiastic about promoting sustainable travel and who will motivate others to change their travel habits.

For multi occupier sites and speculative developments it is recommended that an overall Travel Plan Coordinator is appointed at an early stage to provide inputs into the design process and ensuring that adequate measures are provided at the earliest instance. Following the occupation of the development, the individual occupiers should appoint their own travel plan coordinator to implement their Travel Plan and form a point of contact with Gloucestershire County Council.

## 8. Travel Plan Monitoring and Review

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It is essential that Travel Plans are monitored in order for effectiveness to be gauged. This is useful to the Travel Plan Coordination to understand what changes have occurred, and also informs GCC who can understand whether Travel Plan obligations or conditions are being met.

### 8.1.1 Monitoring reports

As mentioned in the previous chapter, applicants are required to submit annual monitoring reports to GCC or their designated consultants. As a minimum the report should contain:

- **Details of progress made since the submission of the previous annual report:** This could include details of measures which have been implemented, participation in events e.g. bike week. It should also include details of any other changes which have occurred over the year, which are significant to the Travel Plan e.g. rise in staff numbers at the site;
- **A summary of the monitoring results:** As a minimum this should include the results of the travel survey. However, where applicable it may include the results of surveys undertaken of cycle parking usage, traffic counts at the access point/relevant junctions, review of patronage of works buses etc;
- **An assessment of whether Travel Plan targets are on track to be met:** If the results show that targets are not likely to be met either due to negative shifts in modal shares or little movement from the previous survey, it should be considered as to whether it is appropriate to implement remedial measures at this stage.

### 8.1.2 Review

An Identification of actions and priorities for the forthcoming year should also be outlined in the monitoring report. Former sections detailing the progress, monitoring and targets should inform and justify a review of the measures being implemented. The review needs to explain what further actions are to be undertaken to help meet the targets contained within the Travel Plan and why these have been selected.

### 8.1.3 The role of GCC

GCC will assure by the developer or occupier that the travel plan is being implemented in accordance with the approved travel plan document. In particular GCC will:

- monitor the travel plan's compliance;
- review submitted reports;
- record and review figures and targets;

- Table 9.1 The Role of GCC

Action	Initiate	Stage/Timescale
Advise on the appropriate type of Travel Plan required	The Developer should make the initial request	Pre-application
Agree the TA	Developer to submit TA	Pre-application
Review the submitted travel plan and approve it if it aligns to this guidance and is suitable for the development.	Developer to submit TP	Application or time specified in the legal agreement
Draft agreement	Developer to submit and undertaking to GCC Legal Services	Application
Review the annual monitoring reports submitted by the site Travel Plan Coordinator	Site Travel Plan Coordinator	On agreed trigger dates (e.g. completion and annually thereafter)

The cost associated with GCC's assistance in evaluating and supervising the Travel Plan is £1,000 per year (depending on the size of the site\*), applicants will be required to pay this sum to GCC for a period of 10 years. This is in addition to any contributions secured for sustainable travel and the cost of preparing and implementing the Travel Plan.

\* NB. large developments such as residential developments over 1,000 units or large mixed use retail and employment sites may incur extra costs. Those developments beneath the specified thresholds that still warrant a travel plan for 'other considerations' may incur less or no costs for monitoring.

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## A.1 Travel Plan Thresholds in DfTs Guidance on Transport Assessment

No.	Land use	Use/description of development	Size	TA/TP
1	Food retail (A1)	Retail sale of food goods to the public - food superstores, supermarkets, convenience food stores.	GFA	>800 m <sup>2</sup>
2	Non-food retail (A1)	Retail sale of non-food goods to the public; but includes sandwich bars - sandwiches or other cold food purchased and consumer off the premises, internet cafés.	GFA	>1500 m <sup>2</sup>
3	A2 Financial and professional services	Financial services - banks, building societies an bureaux de change, professional services (other than health and medical services) - estate agents and employment agencies, other services - betting shops, principally where services are provided to visiting members of the public.	GFA	>2500 m <sup>2</sup>
4	B1 business	(a) Offices other than in use within Class A2 (financial and professional services) (b) Research and development - laboratories, studios (c) Light industry	GFA	>2500 m <sup>2</sup>
5	B2 General Industrial	General industry (other than classified as in B1). The former 'special industry' use classes, B3 - B7, are now all encompassed in the B2 class	GFA	>5000 m <sup>2</sup>
	B8 Storage and Distribution	Storage or distribution centres - wholesale warehouses, distribution centres and repositories		
6	C1 Hotels	Hotels, boarding houses and guest houses, development falls within this class if 'no significant element of care is provided'	Bedroom	>100
7	C2 Residential institutions - hospitals, nursing homes	Used for the provision of residential accommodation and care to people in need of care.	Beds	>100
8	C3 Dwelling houses	Dwellings for individuals, families or not more than six people living together as a single household. Not more than six people living together includes - students or young people sharing a dwelling and small group homes for disabled or handicapped people living together in the community.	Dwelling unit	>60 units

## A.2 Key Development Stages and Travel Plan Checklist

Below is a checklist to support the preparation of a Travel Plan. This outlines the process for developing the Plan and provides an indication of the areas that should be covered within the document.

Stage/Role	Activity
<b>Scoping</b> Preparation of transport assessment	<ul style="list-style-type: none"> <li>Establish need for TA and TP</li> <li>Agree type of TP with Gloucestershire County Council</li> <li>Exchange contact details</li> <li>Establish and agree any baseline data and key outcomes</li> </ul>
<b>Pre-application discussions</b> Preparation of travel plan, including provision of appropriate resources	<p>Submit draft for initial evaluation to include:</p> <p>Travel Plan Checklist</p> <ol style="list-style-type: none"> <li><b>Development Details</b> Location, operations, no. staff, hours of business.</li> <li><b>Baseline Sustainability Audit</b> Accessibility, parking, local services.</li> <li><b>Objectives</b> Aims, intentions and outcomes.</li> <li><b>Travel Plan Measures</b> Soft measures intended to achieve outcomes and promote sustainability.</li> <li><b>Travel Plan Coordinator</b> Role and contact details/post. Resources, permanent/part time?</li> <li><b>Targets</b> Clearly defined, achievable, measurable and dated with responsibility assigned</li> <li><b>Baseline Travel Survey</b> Census/TRICS data used or staff/residential survey undertaken</li> <li><b>Monitoring Strategy</b> Process, responsibility and timeframe</li> <li><b>Remedial Strategy</b> Disincentives and/or sanctions</li> <li><b>Funding Sources</b> Resources available and where they will come from.</li> <li><b>Action Plan</b> Detailing actions, responsible party and timeframes.</li> </ol> <p>Agree draft terms of legal agreement</p>
<b>Submission</b>	<p>Submit final TA and TP</p> <p>Agree any amendments and finalise supporting documentation</p>

Stage/Role	Activity
Planning application	<p><b>Post determination of planning application and pre-occupation</b></p> <p>Notify authority and give contact details. Provide baseline data to Gloucestershire County Council for review. Commence implementation of measures, including completing full travel plan where relevant.</p>
	<p><b>Appointment of TPC Occupation</b></p> <p>Liase with operators, market TP to all relevant parties</p> <p>Occupier/Developer ensures full implementation of TP, including completion of full TP where relevant (see above for TP Checklist) for agreement by GCC</p> <p>Provide all necessary pre-occupation data for agreement by GCC.</p>
Monitoring	<p><b>Post occupation</b></p> <p>Collect monitoring information and present to LA, ensure satisfactory outcomes and maintain long-term effective management</p> <p>Occupier (or agent) monitors travel plan outcomes as agreed and in line with Gloucestershire County Council's requirements. Data collected for monitoring purposes to agreed timescale in agreed format.</p> <p>Review undertaken to agreed timescales:</p> <ul style="list-style-type: none"> <li>• If outcomes agreed and in line with targets, continue to monitor.</li> <li>• If outcomes not in line with targets, follow remedial measures or consider amendments to plan.</li> </ul>
	<p><b>Default</b></p> <p>LA considers use of default mechanisms if outcomes not delivered e.g. fee per trip/contributions.</p>

### A.3 Template Travel Plan

<b>Development Details</b>	
Application number/reference	
Size of development	
Operational activities	
Staff numbers	
Unit numbers (e.g. dwellings)	
Parking spaces	
Scope	
<b>Baseline Audit</b>	
Location	
Access	
Walking	
Cycling	
Public transport	
Private car	
Fleet	
<b>Objectives</b>	
Aim	
Outcome	
Measures & Incentives	
Physical infrastructure	
Walking	
Cycling	
Car share	
Public transport	
Car parking	
Reducing the need to travel	
Fleet	
Marketing and awareness	
<b>Coordination</b>	
Contact details	
Person responsible for appointing the TPC	
Role (including time of appointment and duration of post)	
Responsibilities	
Liaison	
Review process	
Monitoring outcomes	
<b>Targets and Outcomes</b>	
Baseline	
SMART Targets (Specific, Measurable, Appropriate, Realistic)	

and Time bound)					
Duration					
<b>Baseline</b>					
Survey aims					
Survey objectives					
Frequency and timeframe for surveys					
Reporting process					
<b>Monitoring Strategy</b>					
Monitoring process					
Responsible person(s)					
Surveys (Staff, resident, traffic, cordon) and incentives					
Outcome (e.g. reports)					
Timeframe					
<b>Review</b>					
Review process					
Responsible persons					
Timeframe					
<b>Remedial Strategy</b>					
Measures					
<b>Funding sources</b>					
Contributions					
Coordinator					
Measures					
Monitoring and review					
Remedial strategy					
Action/Objective	Target	Indicator	Responsible party	Resources	Start/End Date (or frequency)
<b>Physical measures</b>					
•					
<b>Travel Plan Coordinator</b>	• To appoint the TPC on commencement of the development.	• TPC appointed to provide input to design process.	• Developer	• £xx,xxx • Hrs	• On commencement of development & for 10 yrs from occupat'n.
<b>Services &amp; facilities</b>					
•					
<b>Marketing &amp; incentives</b>					
•					
<b>Monitoring &amp; review</b>					Annual
•					
<b>Remedial Strategy</b>					
•					

## A.4 Legal Agreements

### Condition

A condition is only suitable for physical infrastructure required as a means of aiding the measures of the travel plan.

For example: A pedestrian and/or cycle way that could be promoted and would offer improved access and/or a link to local services.

### Contribution

Contributions will be agreed on a development specific basis, please see Transport Planning Advice Sheets for further guidance [www.gloucestershire.gov.uk/tpguidance](http://www.gloucestershire.gov.uk/tpguidance)

### Legal Agreement (Section 106)

Travel plans should be secured through legal agreements to ensure ample flexibility and the ability to include related costs and contributions.

### Example clauses

There are 6 template agreements;

1. Template 1 Residential Travel Plan - contribution only
2. Template 2 Residential Travel Plan - Implemented by Developer
3. Template 3 Business extension or development
4. Template 4 Business - multi occupation site
5. Template 5 Mixed use - Employment (3 or 4) and Residential contribution (1)
6. Template 6 Mixed use - Employment (3 or 4) and Residential – by Developer (2)

Each agreement requires a monitoring fee and either a contribution or a bond/cash deposit, to be repaid on successful completion of the travel plan.

### Template Requirements

Template:	Resi Contrib	Resi by Dev	Business	Multi Occ	Mxd 3 + 1	Mxd 3 + 2
	1	2	3	4	5	6
Contribution	✓	□	□	□	✓	□
Bond/Cash Deposit	□	✓	✓	✓	✓	✓
Year 1 Baseline	□	✓	✓	✓	✓	✓
Year 3 Target	□	✓	✓	✓	✓	✓
Year 5 Target	□	✓	✓	✓	✓	✓
Year 10 Target	□	Size dependant				
Year 3 repayment	□	✓	✓	✓	✓	✓
Year 5 repayment	□	✓	✓	✓	✓	✓
Year 10 repayment	□	Size dependant				
TPC appointed by Glos CC	✓	□	□	□	✓	□
TPC appointed by Developer/Owner	□	✓	✓	✓	✓	✓

Please see examples at [www.goucestershire.gov.uk/tpguidance](http://www.goucestershire.gov.uk/tpguidance)

### Template Schedules

<b>Employment Schedule</b>	
Proposed Employment Travel Plan to include:-	
(a)	the proposed Modal Share Target
(b)	immediate continuing and long term measures to achieve the Modal Share Target by promoting and encouraging alternatives to single occupancy car use
(c)	the Implementation Timetable
(d)	travel information leaflets and public transport 'taster' tickets for staff of and visitors to the Employment Units
(e)	the responsibilities of the Travel Plan Co-ordinator
(f)	a monitoring strategy for the Travel Plan including the submission of an annual monitoring report to the Council

<b>Residential Schedule</b>	
Proposed Residential Travel Plan to include:-	
(a)	the proposed Modal Share Target
(b)	immediate continuing and long term measures to achieve the Modal Share Target by promoting and encouraging alternatives to single occupancy car use
(c)	the Implementation Timetable
(d)	travel information leaflets and public transport 'taster' tickets for occupiers and visitors to the Residential Units
(e)	the responsibilities of the Travel Plan Co-ordinator
(f)	a monitoring strategy for the Travel Plan including the submission of an annual monitoring report to the Council

## A.5 Useful Information

Transport information on various ways of getting about in Gloucestershire, including parking, public, accessible and school transport, and information and advice for car users, motorcyclists and cyclists. [www.goucestershire.gov.uk/transport](http://www.goucestershire.gov.uk/transport)

For bus transport maps and timetables in Gloucestershire go to  
[www.goucestershire.gov.uk/bustimetables](http://www.goucestershire.gov.uk/bustimetables)

Commuting by Rail in Gloucestershire  
<http://www.goucestershire.gov.uk/index.cfm?articleid=7794>

Where to get walking and cycling information  
Cycling [www.goucestershire.gov.uk/index.cfm?articleid=74](http://www.goucestershire.gov.uk/index.cfm?articleid=74)  
Walking [www.goucestershire.gov.uk/index.cfm?articleid=1190](http://www.goucestershire.gov.uk/index.cfm?articleid=1190)

Car sharing in Gloucestershire  
[www.carsharegloucestershire.com](http://www.carsharegloucestershire.com)

Long term plans, policies and strategies for transport, roads and maintenance in Gloucestershire  
[www.goucestershire.gov.uk/index.cfm?articleid=8081](http://www.goucestershire.gov.uk/index.cfm?articleid=8081)

Gloucestershire Local Transport Plan [www.goucestershire.gov.uk/ltp3](http://www.goucestershire.gov.uk/ltp3)

Gloucestershire Highways contact for information on road works and maintenance

- Tel:+44 08000 514 514
- mailto:[highways@goucestershire.gov.uk](mailto:highways@goucestershire.gov.uk)
- [www.goucestershire.gov.uk/highways](http://www.goucestershire.gov.uk/highways)

You can download 'A Travel Plan Resource Pack for Employers' from the Department for Transport

- [Department for Transport - Workplace Travel Plans](#)

For examples and case studies of current travel plans are available to view at Travelwise

- [National TravelWise Association](#)

The Association for Commuter Transport (ACT) offers employers a source of advice and information on travel plans

- [The Association for Commuter Transport \(ACT\)](#)