

3 Preparing the contents of a Travel Plan

This section outlines the range of content for a travel plan to be approved by the LHA. This should be read alongside Table 2.1 which shows the requirements of the different tiers of travel plan.

The overall process for the development of travel plans is shown in Figure 3.1 below. In all cases, more detail, worksheets and guidance can be found in Manual for Travel Plans and on the Travel Plan Resource Centre on www.movingsomersetforward.co.uk/new-developments.

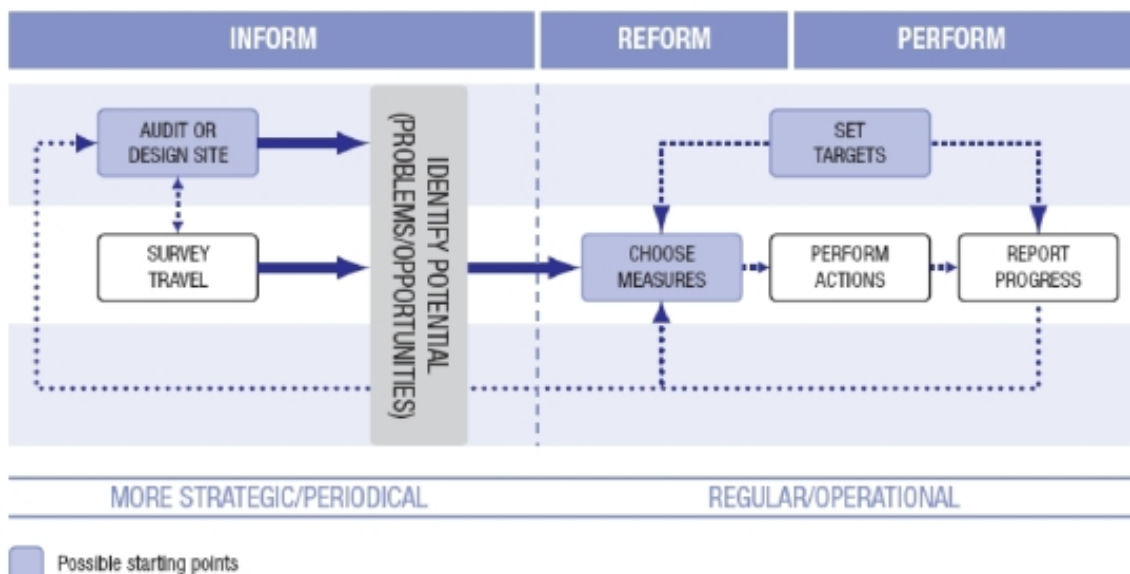


Figure 3.1 Plan preparation and implementation flow chart (Source: SCC, 2008).

3.1 Linking Travel Plans, Design and Access Statements and Transport Assessments

MfTPs lists the documents that will need to be considered when preparing the content of the travel plan; in particular, these include the outcomes of the TA (where required; Table 2). The travel plan will also need to help drive the content of the Design and Access Statement, design codes and any revisions to the TA (where produced). Somerset requires the travel plan to be kept up to date throughout the planning process, with details included from other planning documents (such as Transport Assessments and Design & Access Statements) as they come forward and evolve.⁽¹⁹⁾

19 DfT/DCLG (2009, Section 5) states: “The travel plan should take the form of a single integrated document containing all key information. ... “- encourage good urban design principles that open up the permeability of the site to walking and cycling, linked to the **design and access statements**; “...it is important to ensure that the travel plan addresses the issues raised in the transport assessment, and that the TA has identified all the relevant site specific issues.” (p83) [e.g. see p80 which lists specific considerations from the TA to be included within the travel plan]

TAs set out and analyse the likely travel movements to be generated by all modes of transport (the likely demand), and assess whether these can be carried sustainably on the current transportation network (including footways, cycleways and public transport). The travel plan should use this evidence, in combination with other objectives and targets, to produce an ongoing management framework (with timescale of actions) to increase the use of alternative modes of transport to the private car and where this is not possible to lessen the impact of private vehicle use.

3.2 Content of the Travel Plan

All travel plans must be appropriately structured according to the guidance set out in Table 1.2 and for larger developments Appendix 6.

A Contents Checklist, which can be used to structure the contents of the travel plan during its preparation prior to submission, is available from www.movingsomersetforward.co.uk. As outlined in Table 1.2, there are three main elements to a travel plan, with supporting Appendices:

Main elements:

- **Site Audit Report**
- **Action Plan**
- **Monitoring Strategy and Modal Share Targets**

Appendices (where not included in body of travel plan):

- **Location maps, including neighbourhood map with all off-site transport links and proposed walk and cycle desire lines to the development; and strategic map showing location of site in Somerset**
- **Detailed site plan with all physical measures marked on site plans**
- **Technical specifications/drawings for cycle and motorcycle parking and any other relevant physical features**
- **A polar plot**
- **Examples of planned information provision (leaflets, websites, etc.)**
- **Tables of modal share targets using SCC standard templates**
- **SCC standard questionnaire survey forms**
- **Parking management strategy**
- **Communications strategy**
- **Travel plan coordinator job description**

A template travel plan for major development sites is included in Appendix 6.

3.2.1 Site Audit Report

The report must include information about all existing travel opportunities to, from and within the development site for all modes of travel. Applicants should consult MfTPs when preparing a Site Audit Report (Site Audit and Design Guidelines) and

Contents Checklist (available from www.movingsomersetforward.co.uk) which explains the type of detail to be provided. Areas that should have a particular level of detail are:

- **Walking and cycling routes off-site between the development and local facilities, shops, employment and residential areas, other local points of interest and transport services, and provision of route signage**
- **Location of bus stops, destination of bus routes, service schedules and fares**

MfTPs provides a methodology to collect the necessary evidence around four themes:

1. **Accessibility**
2. **Comfort**
3. **Safety and security**
4. **Travel information**

Travel plans must include a polar plot to visually summarise the strengths and weaknesses of a development site in terms of ability to generate smarter travel choices. This can easily be referred to in the event of targets not being met, and allows the current level of accessibility to the development site to be established.

For developments without transport assessments:

Travel Plans for smaller applications may not be accompanied by a Transport Assessment, or a Transport Statement. Additional data may therefore need to be collected to extend the evidence base for the Travel Plan; developers should refer to MfTPs.

3.2.2 Action Plan

All travel plans must consider the inclusion of a range of measures in response to the individual needs of each development. An Action Plan will need to present detailed information about the measures that are intended to be implemented to improve travel options for staff, customers and visitors.

This should include, but not be limited to, measures relating to the physical design and infrastructure in and around the development.

The specification of measures in the travel plan must always include:

- **Start date**
- **Duration/End date**
- **Quality – specification, e.g. relevant standards or dimensions**
- **Quantity**
- **Location for physical measures**

If any of the measures suggested in Table 1.2 or 3.1 below are not included within a travel plan, an explanation should be provided to justify why they are not needed.

- Guidance on the choice of travel plan measures:

The selection of travel plan measures/works will focus on remedying any failings that would deter or prevent travel by alternative modes. Travel plans seek to actively encourage the transfer of trips from the private car to alternative modes of transport, and the maintenance of any sustainable travel patterns that already exist. This may include providing financial incentives to users as well as infrastructure or services to ensure that best value is extracted from investments to confer a genuine advantage from alternative travel choices. Such methods of travel management are preferred over mitigation by the sole implementation of highways works which favour use of the private car alone. Figure 3.2 shows how the strength of a travel plan in delivering modal shift varies according to the range of measures selected.

A statement should also be included such that any measures that may conflict with the objectives of the travel plan, e.g. posters, incentives or competitions to promote car use, will not be implemented without prior further approval from the LHA.

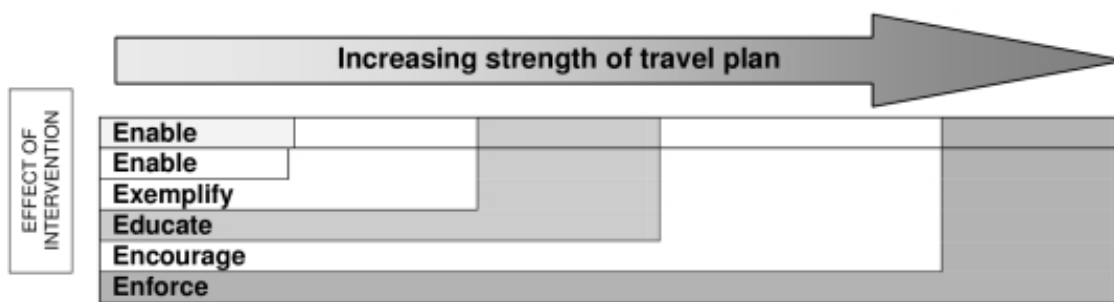


Figure 3.2 The content of the Action Plan. Refer to Table 3.1 for measures relating to these headings.

Explanations of key common travel plan measures are listed in Table 3.1 below. These definitions form the standards to which measures should adhere. Appendix 6 and 8 and Table 1.2 include a list of standards measures, from the measures suggested in MfTPs and from the iOnTRAVEL database, which may be put to use within a travel plan.

Example Measures	Description of measure
Educate	Informational measures
Site-Specific Travel Information leaflet	A leaflet directed at Members of the Community produced (designed and printed) to a standard acceptable to the LHA displaying in an engaging form travel options and information for all Modes of Travel prepared according to the Educate section of MfTPs.
Smarter Travel Information Pack	A pack of leaflets and other printed information directed at Members of the Community produced and packaged to a standard acceptable to the LHA

Example Measures	Description of measure
	containing travel options and information for all Modes of Travel prepared according to the Educate section of MfTPs.
Travel Website	A series of internet pages prepared at the developer's expense to reflect the opportunities to, from and within the development site for all Modes of Travel and submitted to and approved by the LHA's Travel Plan Coordinator prior to the commencement of any marketing for any part of the development and in all cases prior to first occupation in accordance with the Educate section of MfTPs
Travel Information Noticeboards	Noticeboards located internally and externally included explicitly in any drawings and plans relating to the layout and physical structure of the development for the sole purpose of providing travel information for all Modes of Travel in accordance with the Educate section MfTPs and the travel noticeboard template to a minimum dimension of 1.5m x 1.5m to a specification submitted to and approved by the LHA's Travel Plan Coordinator prior their construction which shall include right of access for the Site Travel Plan Coordinator and the County Council's Travel Plan Coordinator to said noticeboard and its contents.
Exemplify	Management measures
Travel Plan Coordinator	<p>Site Travel Plan Coordinator to assist with the management, coordination and implementation of the Travel Plan in accordance with the Exemplify section of MfTPs provided that for the benefit of doubt the sole responsibility for implementing the Content of the Travel Plan lies with the developer.</p> <p>The travel plan co-ordinator will also act as a principal point of contact for residents/employees/visitors interested in the travel plan or travel opportunities at the site and will promote the travel plan to this audience. For this reason, it is important that the coordinator is familiar with the site and visits it regularly, sets a good example, and can be easily contacted by</p>

Example Measures	Description of measure
	<p>everyone the travel plan applies to. The travel plan coordinator will also be main point of contact for the LHA in their supervisory function.</p> <p>Other forms of travel plan coordinator include travel plan representatives (for smaller sites or individual units) and travel plan organisers (for the period prior to occupation to manage the implementation of initial measures in the travel plan). On small developments, this might be incorporated into the job of an existing employee. For larger developments, especially those comprising a mixture of uses and multiple occupants, it may be necessary to recruit a dedicated coordinator.</p> <p>The responsibilities of the site travel plan coordinator and the duration of the role will be agreed between the developer and the local authority as part of the agreed travel plan. The Job Description will need to be included within the travel plan. In all circumstances, the developer shall be responsible for securing the provision, or funding for the provision of, an appropriately trained travel plan coordinator(s) in development sites where a travel plan is required.</p>
<p>Smarter Travel Policy Dossier</p>	<p>A folder or document containing business travel policies including the following information:</p> <ul style="list-style-type: none"> ● Business travel hierarchy, favouring smarter travel choices; ● Flexible working policies; ● Sustainable meeting venues hierarchy; ● Bad driving reporting systems; ● Employment of a travel plan coordinator; ● Travel plan induction process (providing information about car clubs, car hire, cycling, walking, buses, trains, taxis, lift sharing, flexible/smarter working, home delivery, booking travel and accommodation for business travel etc.); ● Smarter site-specific travel information on company website; ● Corporate bicycle loan for work trips; ● Discounted cycle purchasing;

Example Measures	Description of measure
	<ul style="list-style-type: none"> ● On-site cycle repair sessions; ● Corporate car loan for work trips; ● Reimbursement rates for all Modes of Travel. <p>Drafts should be submitted to and approved by the LHA and prepared according to the Exemplify section of MfTPs..</p>
Encourage	Incentives
Residential Travel Voucher	An amount to be made available to each set of occupants repeated for a maximum of three tenures per unit offered at the first occupation of each tenure and continually for 5 years following the first occupation of each unit and made repayable to householders at a yearly frequency across the development to match fund any defined expenditure incurred in adopting sustainable travel patterns
Promotional Activity	On-street event, fair or other occasion in accordance with the Encourage section of MfTPs manned by the Site Travel Plan Coordinator to promote the Travel Plan and the Modes of Travel contained within it advertised to all Members of the Community and to which all Members of the Community are invited
Enforce	Parking measures
Cycle Parking	Dedicated fixtures and fixed covering structures in accordance with Section 4 of this guidance and the Encourage section of MfTPs for a number of cycles to a specification and location submitted to and approved by the LHA's Travel Plan Coordinator prior to the auditing and approval of and included explicitly in any drawings and plans relating to the layout and physical structure of the development
Motorcycle Parking	Dedicated fixtures and fixed covering in accordance with Section 4 of this guidance and the Encourage section of MfTPs to a specification and location submitted to and approved by the LHA's Travel Plan Coordinator prior to the auditing

Example Measures	Description of measure
	and approval of and included explicitly in any drawings and plans relating to the layout and physical structure of the development
Electric Vehicle Charging	Live outdoor electrical plug sockets proximal to areas of car parking within the curtilage of dwellings or in car parks to provide for the charging of electrically-powered vehicles
Employment Car Sharer Parking	Signed and marked parking spaces for car sharers at a location submitted to and approved by the LHA's Travel Plan Coordinator prior to the auditing and approval of and to be included explicitly in any drawings relating to the layout and physical structure of the development in accordance with Section 4 of this guidance and the Enforce section of MfTPs

Table 3.1 Definition of standard travel plan measures

Site Travel Plan Coordinator:

TVS 6

The developer, owner or occupiers of developments meeting relevant thresholds will appoint a member of staff to act as a Travel Plan Coordinator or Manager. The appointed staff member will have time allocated and skills to enable the duties involved in implementing the travel plan to be discharged.

Size of development		Site Travel Plan Coordinator Requirement (Days Per Week)
Employment developments (Employee Numbers; <i>indicative GFA equivalent for general B1 in brackets</i>)	Residential Developments (Dwelling Units)	
25 or less <i>(500m² or less)</i>	80 or less	½ day (indicative)
26 to 50 <i>(501-1000m²)</i>	81 to 200	1 day

51 to 100 (1001-2000m ²)	201+	2 days
101-200 (2001-4000m ²)		3 days
201+ (4001m ² +))		5 days (full time)

Table 3.2 Site TPC indicative working requirement based on number of employees or dwellings

Further information about the role of the TPC is given in Section 6.

Locker and shower ratios:

Lockers, showers and drying cupboards/cabinets must be provided within new developments to encourage cycle use and active travel. Showers should be provided at rates as per Table 3.3 below for all buildings with travel plans:

Size of development (Employee Numbers; <i>indicative GFA equivalent for general B1 in brackets</i>)	Shower Provision Requirement
0-100 employees (0-2000m ²)	1 shower minimum + 1 shower per further 50 employees, 5 cyclists/cycle spaces or 1000m ² <i>e.g. 2000m² would require 3 showers</i>
101-500 employees (2001-10,000m ²)	As above + 1 shower per further 100 employees, 10 cyclists/cycle spaces or 2000m ² <i>e.g. 10,000m² would require the 3 showers from above plus 4 additional showers (total 7 showers)</i>
501+ employees	As above

Size of development (Employee Numbers; <i>indicative GFA equivalent for general B1 in brackets</i>)	Shower Provision Requirement
(10,000m ² +)	<p>+ 1 shower per further 250 employees, 25 cyclists/cycle spaces or 5000m²</p> <p><i>e.g. 20,000m² would require the 7 showers from above plus 2 additional showers (total 9 showers)</i></p>

Table 3.3 Provision of Shower Facilities

Lockers must be provided at a minimum rate of 1 in 3 employees and for all walkers, cyclists and motorcyclists. They should be of an appropriate size for equipment to be stored.

Additional actions:

All Travel Plans must contain an agreed reserve set of actions (or 'safeguards'), which can be called upon should the targets in the travel plan not be achieved. The travel plan will need to set out these processes and the list of safeguards with trigger points, timescales and dates, and amounts (of funding or actions). This is set out in Section 5.

Action Plans for speculative development sites:

For speculative developments (including outline planning applications), one single detailed travel plan (sometimes known as a travel plan framework, interim or umbrella travel plan) is required to cover the entire development site. This umbrella travel plan should be a portfolio and be updated with further short schedules of measures aimed at particular land-uses/Traffic Generating Unit within a development (known as Tables of Measures) for each occupier.

Tables of Measures must be submitted prior to or no later than 6 months after the first occupation of each part or phase of the development. These will often be required in advance of commencement, depending on details contained within the travel plan. Together with detailed business travel management strategies, these must be approved by the LHA within 9 months of businesses occupying their part of the site in an operational capacity. Once approved by the LHA, Tables of Measures shall form part of the travel plan and be added to the initial Action Plan.

Subsidiary travel plan components such as Tables of Measures do not remove the need for an Action Plan to be provided initially as part of travel plans submitted with outline planning applications or by multiple future site occupiers.

Area-wide travel planning initiatives:

Smaller developments within areas with a specific focus on travel planning may be required to produce travel plans or contribute towards a travel plan covering a wider area, e.g. by providing travel plan measures or a travel plan representative.

Larger developments may be required to fund the setting up or ongoing maintenance of area-wide travel plans (including community trusts or travel management organisations), that cover their development and neighbouring land uses that may or may not be covered by existing travel plans. This is particularly likely in areas around Somerset's motorway junctions and developments consisting of or adjacent to large scale employment or residential developments.

TVS 7

Developers should deliver or fund area-wide travel plan initiatives and work together with other relevant developers and existing communities and travel generators to deliver economies of scale in the implementation of coordinated and shared travel plan measures, in areas of large scale (re-)development.

3.2.3 Monitoring Strategy

The travel plan must include a monitoring strategy stating the methodology and schedule for monitoring travel by all modes to, from and within the development site by staff, customers and visitors. This strategy must contain targets for reducing car use and maximising non-car forms of travel (modal shift). The setting of targets should inform the list of measures in the Action Plan designed to achieve these targets.

TVS 8

All travel plans meeting the relevant thresholds must contain relevant modal share percentage and trip rate targets for single occupancy vehicle travel to and from work, and as appropriate to the type of development targets for travel in the course of work and customer arrivals. These must be set at the time of agreeing the travel plan and prior to the commencement of development in order to assess the travel impacts of new developments.

An inability to conduct surveys before setting targets is not accepted as a valid reason for not including targets in the approved travel plan. Uncertainty over the identity of the future occupants of a development is not accepted as a reason for lack of required detail in the travel plan for the implementation of measures or setting of targets. Sufficient guidance is provided in MfTPs in order for modal share targets to be set.

The monitoring strategy must include:

- a timetable for monitoring activities (determined by the Action Plan)
- details of when and how the data will be collected
- details of surveys to be undertaken including target response rates (a minimum of 40% is required) and incentives
- details of manual and automatic traffic counts
- details of how safeguards will be applied
- commitment to use the LHA's standard surveys and data collection and reporting procedures

The LHA expects each travel plan to have standard text (below) on how the travel plan will be monitored:

The travel plan will be monitored annually for no less than five years from the 80% occupation of each phase, or until it has achieved its modal share targets for the set fifth/ninth year (whichever is later). Monitoring will be carried out using the LHA's standard travel plan survey template. Results will be analysed and aggregated using the LHA's Excel questionnaire template. Modal share results will then be input into iOnTRAVEL no more than 3 months after the survey closing date. All questionnaire surveys will achieve a minimum 40% response rate, otherwise the survey will be repeated or further responses sought. The LHA's advice contained in Manual for Travel Plans will be used to ensure that the survey manages this level of response (page refs, e.g. p13 in the Monitoring Guidance). This will be accompanied by a report using the LHA's standard annual report template.

The monitoring methodology must be agreed with the LHA and all targets must be entered into iOnTRAVEL. In all cases any data must be collected, analysed and reported at the developer's own cost. The LHA's fee for supervising and monitoring the information provided is included in the Travel Plan Fee (see Section 2).

Monitoring provides the basis on which safeguards relating to unsatisfactory progress will be applied (see section 6). All Full Travel Plan sites must provide automatic traffic counters (ATCs). See Section 6 for more information on the implementation, management and ongoing monitoring of the travel plan.

- Using Targets in Travel Plans:

Modal share targets are quantified figures for the proportion of trips carried out by all Modes of Travel over the course of a year, across a number of years, for a specified journey purpose such as travelling to work. Modal share targets are expressed as percentages and survey data is collected as absolute numbers of journeys. Targets and survey data must be recorded on iOnTRAVEL.

Targets must be set for the following Modes of Travel:

- Car with Driver Only (Single Occupancy Vehicle, SOV) or Taxi with One Passenger;

- Public Bus;
- Shuttle/Employer Bus;
- Car With Other Person(s);
- Cycling;
- Motorcycling (125cc and under);
- Motorcycling (over 125cc);
- Park and Ride;
- Train;
- Walking;
- Work at Home (or Tele-/Videoconferencing for travel in the course of work);
- Work Off Site Without Calling at Work

Taxis must be included in either the SOV or car sharing category, depending on the number of passengers the taxi is holding for the duration of its journey.

Car sharing should only be used where journeys are shared with other persons on the journey to work (excluding school children). For car sharing to apply, the vehicle must have been shared for a substantive part of the journey distance (but not necessarily all occupants having shared the same origins and destinations).

How stretching should the target be?

It is unlikely that a travel plan may be able to achieve a greater than 30% reduction in the Census figures for any particular town without access to high quality transport alternatives, because of the external dependencies that affect travel choice.

The travel plan should inform a revised estimate of vehicle trip rates and modal share which must be included within the Transport Assessment.

Calculating a target:

Targets should be ambitious and correspond to the best estimate of the maximum number of trips that can be achieved by non-car modes (assuming attention has been paid to reducing the need to travel). As a result, targets should correspond to the minimum number of journeys to and from the development site by car that can be achieved in the context of the operation of the specific activity at the site. Benchmarking is important in informing this estimate, but it has to be recognised that each development is unique. Information that can be used to assist in benchmarking includes:

- Trip generation databases, e.g. TRICS
- Information about trips generated from similar types of development in the same area
- Information about levels of car use and ownership in the area of the development e.g. Census data on modal share of driving for journeys to work; levels of car ownership
- Information about the specific nature of the development and the usual level of person trips (i.e. by all modes) likely to be associated with such a development

- Process for setting targets:
 1. Determine a 'starting' vehicle trip generation (from TRICS or method used in the TA)
 2. Determine the total number of person trips (from TRICS or first principles)
 3. Provide a best estimate of the maximum number (or percentage) of trips that can be made by non-car modes, cross-referenced to the measures being put in place to achieve these figures. These combined would give you a target number of car journeys with which to compare ATC figures.
 4. The travel plan must contain clear definitions of the measurements – e.g. weekdays only, or including weekends and times of the day - on which the trip rates and modal splits are to be based.

Section 4 advises on introducing physical infrastructure as part of travel plans, and section 5 advises on how the contents of sections 3 and 4 may be secured.