

Appendix 1, Travel Plan Content Pro Forma

A good Travel Plan (TP) will cover the issues shown below:

1. **Introduction – Scope, Background & Travel Issues**
2. **Aim**
3. **Objectives**
4. **Targets**
5. **Actions**
6. **Monitoring & Review**
7. **Promotion**

You might like to use the format below as a pro forma for your own plan. You won't achieve a workable travel plan by going through the sections in document order; please read the notes in italics for tips.

1. Introduction

This sets the scene for the TP. It outlines what is special about your organisation / location / operation and is split into three headings:

1.1 Scope - Description of what the TP is intending to cover (e.g. addressing commuter journeys, business travel, customer access, deliveries or fleet management), where and why.

1.2 Background - This is a description of your site and organisation in travel terms and is known as a "site assessment" or "site audit." Aim to cover the first four bullet points then decide if the rest are relevant:

- Layouts of the site(s) – highlighting traffic routes by different travel modes (roads, cycleways, footpaths, crossings, bridges etc.)
- Locations of car parks, cycle and motorcycle parking
- Public transport servicing the site, or within walking distance
- Organisational policies relating to travel (relocation packages, accommodation assistance, mileage allowances, provision of cars etc.)
- Locations of major suppliers - highlighting traffic routes by different modes, not forgetting rail
- Locations of other relevant facilities nearby– this might include shops, schools, libraries, sports facilities, crèches etc
- Locations of any staff housing – highlighting traffic routes by different modes

1.3 Travel Issues - After giving the context, list the issues you think need to be addressed by the TP. You may want to undertake a "travel audit" to look at the non-commuter travel associated with your site i.e. business travel, visitor travel and/or deliveries.

Note: A good map is worth a hundred words! What you write in the Introduction initially may not appear in the published travel plan at all, or might go in an appendix. As you work through the remaining steps you may find you want to re-write sections. Remember: This is just your starting point. Don't try to map out the whole of your travel plan here, just put something down on paper as a prompt and move on to the really interesting bits...

...The next three sections covering Aims, Objectives and Targets form the core of a TP. Try to take an iterative approach, start simple, and get more complex only when needed.

2. Aim

In broad terms, what are you aiming to achieve, e.g.

“Our travel plan aims to make travelling to work and at work a safer and healthier activity by encouraging all site users to make appropriate travel choices.”

“We aim to reduce the number of cars parked on our site so that we can build on our car park instead of having to relocate.”

It is worth spending some time on this, as it should become the “mission statement” for the TP. You can have more than one aim.

Note: Ideally, the head of the organisation should endorse this statement of commitment.

3. Objectives

Look at the travel issues you are considering and produce solid objectives from them, e.g.

“Reduce the number of road accidents by staff on company business.”

“Reduce the proportion of single-occupancy vehicles arriving at the site.”

- Which might have the sub objective:

“Increase the number of people arriving at the site on foot, by bicycle, via public transport and car sharing.”

4. Targets

These are the measurable goals by which you assess whether you are successful or not. Targets should be specific, measurable, achievable, realistic and time-related (SMART).

You will probably have a mixture of “aim” and “action” type targets. Examples of aim type targets are:

“Reduce the number of road accidents by staff on company business by 20% within three years.”

“Reduce the proportion of single occupancy vehicles usually arriving on site per 100 employees by 10% by [date].”

“Increase the number of staff making pedestrian trips by 5% by [date].”

Whereas action type targets might be:

“Appoint a Travel Co-ordinator by [date].”

“Provide driver training to all Essential car users by [date] and to all Casual car users by [date].”

“Carry out a travel survey to establish a baseline by [date].”

Note: The TP process allows you to review and revise these targets as you progress. You may not want to set targets until you have analysed your staff travel survey responses. The survey will give you a benchmark from which to monitor progress and attitudinal data to help you decide what to spend time and money on. You might also need surveys of customers or visitors. If your TP is a requirement of Planning Permission, the sooner you carry out a survey the better.

Consider how you will monitor what you set as targets; do you have the data already or will you have to gather it separately? If so, what are the time and cost implications?

5. Actions

This lists what you intend to do to achieve your targets, e.g.

“Provide driver training to all Essential and Casual User staff.”

“Issue walking and cycling maps to all staff.”

“Provide secure, covered, cycle parking near entrances.”

“Make interest-free loans for bus passes available.”

“Develop a car sharing database.”

“Offer a free Emergency Ride Home.”

“Introduce charges for car parking in line with commercial rates.”

Note: Actions need to be thought through carefully, and should be linked to your aims and objectives. Start simple, and only get more complex if you have to.

*What you include here will determine the potential of the plan to change the way people travel (or in transport-speak to bring about modal shift). Depending on your local circumstances, your Travel Plan might include measures in **Appendix 3**.*

*It can be helpful to put the aims, objectives, targets and actions into a matrix for ease of viewing. You can also use the matrix as a project management tool; just add in the steps you need to take to obtain data, formulate your targets etc. It will make the table rather long at first, but you won't miss anything and you can delete unnecessary rows and columns as you go along leaving you with a concise action plan for the TP. See **Appendix 2** for an example.*

6. Monitoring & Review

The well known saying “if you cannot measure it you cannot manage it” applies to travel plans too. It is important to review progress regularly to check that your actions and measures are having the desired effect on targets. This is also your opportunity to publicise the good work to staff, customers and the wider community. In short, although monitoring appears towards the end of the TP document, it is at the heart of the process.

This section should outline the agreed senior management process for:

- Agreeing objectives and targets (Probably through a Travel Plan Group. This will not appear in the published TP)
- Monitoring the TP (Probably through reports to Senior Management Team based on repeat survey data and/or agreed counts e.g. number of bicycles and cars parked over an average week, number of bus pass loans taken up etc)
- Reviewing the TP (Probably through annual review with senior managers. Remember to track costs, savings and other benefits like reductions in sick leave)

Note: Think carefully about what data is already available and how it could be used to implement and monitor your TP. Only collect new data where essential. You will want to commit to re-surveying regularly what you have as targets.

You need data to begin with; the site assessment, travel audit and staff travel survey will probably be the first things you will undertake. The travel audit looks at the non-commuter travel associated with your site i.e. business travel and visitor travel. You may wish to include deliveries.

The staff travel survey is very important as it will establish your baseline. Once you know how people travel now (or intend to travel to a new site) you can measure changes year on year. At its simplest, you ask people how they travel to work, and then analyse the results. You will probably want to ask more detailed questions about why people travel the way they do, and if they are prepared to change given help, to determine where best to spend your budget. Repeat surveys to determine modal shift can be much shorter and simpler.

You can do the site assessment, travel audit and travel surveys in-house if you have people familiar with spreadsheet and database packages and questionnaires or surveys. Some organisations have facilities to perform surveys online. If you do not have these skills available, it might be one area where using a consultant would be advisable.

If the TP is a requirement of planning consent, you will be required by the local planning authority to produce a monitoring report annually for at least the first five years. Ensure that you are clear about who will be involved in monitoring, what will be reported and when. The report should detail progress in the past year and note your plans for the following year.

Finance Note: consider how you will track costs, savings and benefits. It is very helpful to have a representative from Finance on the Working Group and the Travel Plan Group. Your local planning authority will be interested in how you plan to fund the TP, e.g. by introducing car parking charges, as consideration of the budget is a good demonstration of senior management commitment.

7. Promotion

It is important to get people interested in the Travel Plan from the outset and to maintain momentum once you get going. It is helpful to have a Communications Strategy noting the process by which the benefits of a Travel Plan, successes and progress against targets will be communicated.

Managing expectations is the key to successful involvement. When people hear about the travel plan they may expect improvements, for instance to public transport, to be more widespread and occur more rapidly than is possible. It is important to be realistic about timing, what can be done and how difficult it is to change people's travel habits.

Certain factors should be borne in mind when considering how to involve people and when putting together a promotional campaign:

- Do not be anti-car, be realistic - there are benefits of car travel and some people genuinely do not have an alternative available to them
- Stress small changes, whenever suitable
- Promote greater choice of ways of travelling, or not having to travel at all
- Sell the benefits and savings; money, time, health
- Don't talk about 'alternative' modes of travel; not everyone wants to do something 'alternative.' Talk about 'other ways of travelling,' making 'smarter choices' or 'non-car travel' instead
- Ensure implementation and operation of the travel plan is transparent
- Ask for feedback
- Promote continuously, not as a one-off exercise
- Use existing communication networks, for example the intranet, payslips, newsletters, department or team briefings, notice boards. Remember to promote externally too, via internet, the press and other media

Note: The Promotion section could just be an aide memoire for the Travel Plan Group, rather than being included in the written plan. However, if your travel plan is to be reviewed by the Local Planning Authority, it should be included as it will add weight to your plan.