

# **St Helens Metropolitan Borough Council**

## **Guidance Notes for Travel Plans**

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<b>Contents</b>	<b>Page</b>
1. Introduction	3
2. What is a Travel Plan / Travel Plan Statement?	4
3. When is a Travel Plan / Travel Plan Statement Required?	7
4. The Travel Plan Process in St Helens	8
5. Recommended Travel Plan Components	10
6. Travel Plan Initiatives and Management	12
7. Evaluation	13
8. Implementation, Monitoring & Review	14
9. Enforcement, Fees & Payments	16
 <b>Appendices:</b>	
A. Travel Plan Statement Template	17
B. Travel Plan Toolkit	19
C. Action Plan Guidance	24
D. TRACES Evaluation Template	26
E. Standard Conditions	36
F. Useful Links & Contacts	38

## **1.0 Introduction**

- 1.1 This document has been produced by St Helens Metropolitan Borough Council Development Services Section to assist the Council in delivering an effective and efficient Development Control service. It describes how the Council use the planning process to secure Travel Plans to improve and promote sustainable travel. This will help to limit the increase in congestion and pollution arising from a new development, increase the sustainability of the development, and improve the quality of life of residents within St Helens.
- 1.2 It sets out when a Travel Plan is needed and how it should be prepared, its minimum requirements, how it will be evaluated and monitored, and how it is secured. The document also identifies potential measures and initiatives in order that it can be used for both Travel Plans secured through the planning process and for organisations wishing to produce their own voluntary Travel Plans.
- 1.3 Developers are advised to consider the Travel Plan at the earliest opportunity in order to assist in bringing a sustainable development forward and to identify an overall transport strategy for the site. The Council will only usually require a Travel Plan Framework to be included within a planning application when a proposed development exceeds the thresholds outlined in **Table 1**.
- 1.4 Early discussions with the Transport Development Control Team are advised to facilitate in the development of the travel plan and minimise delay in processing the application through the planning process.

## **2.0 What is a Travel Plan / Travel Plan Statement?**

- 2.1 A **Travel Plan** is a package of practical measures aimed at effectively managing the long term transport and travel needs of a site or organisation, with the specific aim of improving access to the site by sustainable modes of transport. A successful Travel Plan will improve travel choice, reduce the impacts of transport on the local environment and increase the overall accessibility of the site.
- 2.2 To achieve this, a series of incentives to encourage sustainable travel and disincentives to reduce single car occupancy use should be introduced at the site. The Travel Plan should enhance the accessibility and transport efficiency of the site, whilst minimising any adverse impact on either the local highway network or other elements of the local transport system.
- 2.3 A Travel Plan should not be viewed as a one-off document; instead, it is an active and dynamic process that will adapt over time to match the changing circumstances of the site and surrounding transport conditions. Each Travel Plan should be tailored to meet the specific needs and characteristics of the site and / or organisation and the surrounding area.
- 2.4 A Travel Plan will as a minimum address journeys to and from work but can be extended to include business travel, fleet management, visitor's arrangements and deliveries. Travel plans can be developed for all types of site / development including employment, education, leisure, healthcare facilities and residential sites.
- 2.5 An effective Travel Plan requires commitment from both the developer / user of the site and the Council. It can bring many benefits, including:
- Cutting carbon emissions and their contribution to climate change
  - Reducing pressure on available car parking by encouraging sustainable travel
  - Contributing to reducing congestion in the wider area
  - Cutting the costs of business travel, fleet operation and logistics
  - Freeing up car park space for expansion
  - Addressing car park shortages
  - Improving access to the site and widening the recruitment area
  - Improving staff retention and increasing attractiveness of employers
  - Improving staff health and thereby productivity through promoting active travel
  - Enhancing the image of the organisation
  - Meeting corporate goals (e.g. corporate & social responsibility, carbon footprint, quality assurance and environmental management)
  - Increasing safety and creating healthier environments
- 2.6 Developers can promote their sites to potential purchasers by promoting the accessibility of the site by a range of modes of transport.
- 2.7 A **Travel Plan Statement** has the same purpose as a Travel Plan but generally has a smaller scope. They are usually for smaller scale developments and are likely to focus on measures to encourage sustainable travel or a contribution towards transport infrastructure improvements.

- 2.8 A Travel Plan Statement template is provided in **Appendix A**. It is recommended that the principles for a full Travel Plan outlined throughout this document are also considered in the development of Travel Plan Statements.
- 2.9 There are different types of Travel Plan, dependent on the nature of the development, and these will influence the level of detail required in the Travel Plan Framework:
- **New developments where the end occupier is known.** Where the end occupier is known, measures identified within the Travel Plan Framework should be introduced from the outset and the Travel Plan should subsequently be implemented within the timescale determined, normally within three months of initial occupation of the site following construction.
  - **Multi-occupancy of a site.** Single buildings within a development site may not individually require a Travel Plan, but the cumulative impacts may warrant an *umbrella* or *area-wide* Travel Plan for the entire site. This should be administered by the developer/site owner. Additional supplementary Travel Plans may be required from each occupier depending on the size and circumstances of the site.
  - **Speculative developments.** A detailed Travel Plan cannot be produced for speculative development where the end user is not identified. In such cases, a framework Travel Plan should be drafted with an undertaking that a final Travel Plan will be submitted once the site is occupied. 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.
  - **Existing occupier extending on site / constructing new premises in the borough.** Unless they already have an established Travel Plan agreed with the Council prior to submitting the planning application, the organisation requiring the development should produce a Travel Plan. The measures identified within the Travel Plan Framework should be introduced from the outset and the Travel Plan should subsequently be implemented within the timescale determined, either set out within a condition / obligation, or within the Plan itself. Where a site is relocating, and the staff to be relocated are known, it should be possible for a travel survey to be undertaken with staff prior to relocation. This survey should identify how they are planning to travel to the new site and their travel motivations. A full travel plan should then be developed and initiatives implemented prior to occupation of the site.
  - **Residential developments.** The details of a residential Travel Plan will depend on the type, location and scale of the development. It will incorporate a package of measures identified within the Travel Plan Framework, including site layout and design, the provision of sustainable transport information and incentives in the form of a welcome pack. The Travel Plan itself needs to be in place prior to occupation of the dwellings.
  - **Mixed use developments.** For developments where use falls into different land use types, discussions should be undertaken with the Transport Development Control Team to agree the best way of approaching the Travel Plan. This will be dependant on the individual circumstances and conditions at the site.

### 3.0 When is a Travel Plan / Travel Plan Statement Required?

- 3.1 The need for a Travel Plan or Travel Plan Statement is influenced by the scale of development. The thresholds for different types of development are summarised in **Table 1**. In cases of extensions to existing sites, a Travel Plan / Travel Plan Statement will usually only be requested if the proposed new development area causes the overall site to exceed the relevant size threshold outlined below.

<b>Table 1: Thresholds for Travel Plans and Travel Plan Statements</b>		
<b>Use</b>	<b>Threshold (GFA unless stated)</b>	
	<b>Travel Plan Statement</b>	<b>Travel Plan</b>
A1 - Food Retail	>250<800sq.m	>800sq.m
A1 - Non-Food Retail	>800<1500sq.m	>1500sq.m
A2 - Financial & Professional Services	>1000<2500sq.m	>2500sq.m
A3 - Restaurants & Cafes	>300<2500sq.m	>2500sq.m
A4 - Drinking Establishments	>300<600sq.m	>600sq.m
A5 - Hot Food Takeaway	>250<500sq.m	>500sq.m
B1 - Business, Office, Research, Light Industry	>1500<2500sq.m	>2500sq.m
B2 - General Industrial	>2500<4000sq.m	>4000sq.m
B8 - Storage or Distribution	>3000<5000sq.m	>5000sq.m
C1 - Hotels	>75<100 bedrooms	>100 bedrooms
C2 - Residential Institutions (Hospitals, Nursing Homes)	>30<50 beds	>50 beds
C2 - Residential Institutions (Residential Education)	>50<150 students	>150 students
C3 - Dwellings	>50<90 dwellings	>90 dwellings
D1 - Non-residential Institutions	>500<1000sq.m	>1000sq.m
D2 - Assembly & Leisure	>500<1500sq.m	>1500sq.m
Stadia	N/A	All
Schools / Colleges / Universities	N/A	All
Development employing over 200 staff	N/A	All

- 3.2 These thresholds are guidelines only and developers are encouraged to consult with the Transport Development Control Team at the earliest possible stage during pre-application discussions regarding whether a Travel Plan is required.
- 3.3 There may be a requirement for a Travel Plan to be provided at sites below these thresholds; for example, where a development would generate significant travel movements in, or near to, an area with a particular environmental or congestion problem such as air quality management areas (AQMA), protected habitat areas or locations with local initiatives or targets are set out for promoting travel plans in the Unitary Development Plan, Local Development Framework or Local Transport Plan.

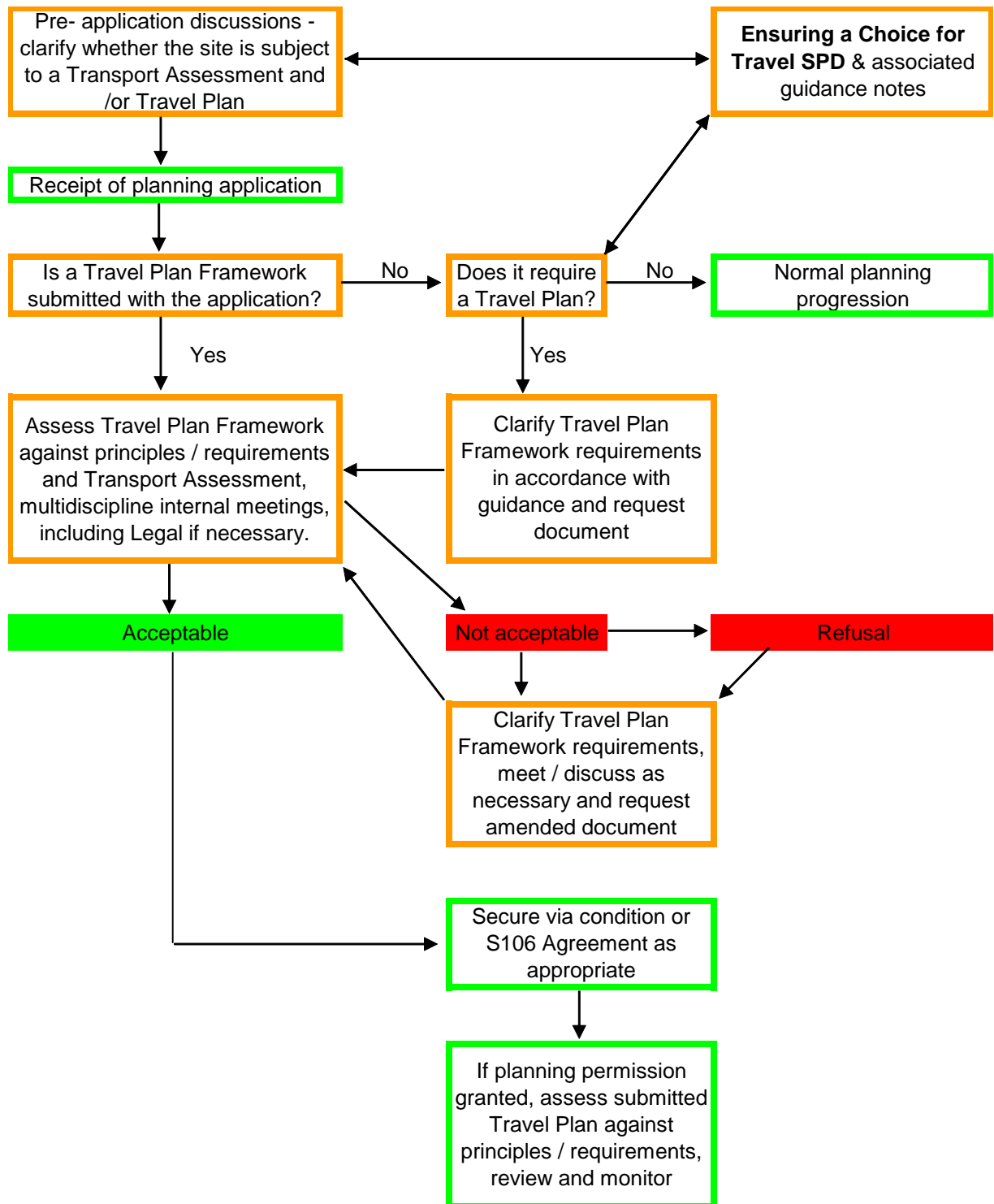
#### **4.0 The Travel Plan Process in St Helens**

- 4.1 Where a proposed development exceeds the thresholds outlined in **Table 1**, a **Travel Plan Framework is usually required to be submitted alongside a planning application**. This allows a greater degree of flexibility in the production of the Travel Plan and will prevent any delay to the planning application process.
- 4.2 Both the framework and full Travel Plan should reflect the findings of the application's Transport Assessment and the travel plan targets outlined within it.
- 4.3 The Travel Plan Framework should address all issues required to an appropriate standard and will be the basis for the final Travel Plan document. The details contained within the Travel Plan Framework will be relevant to the Council's consideration of the planning application and, ultimately, its decision.
- 4.4 In cases where a Travel Plan is proposed as a primary mitigation measure (in association with, or instead of, providing highway / transportation improvements) to reduce trip generation estimates, then the Council need to be confident that the Travel Plan will be robust and maintained or that a fall back position has been secured. In such circumstances, the Travel Plan should be agreed and submitted prior to the granting of any planning consent and will be secured via a S106 Agreement. It should contain a robust set of initiatives to encourage sustainable travel and discourage single occupancy car use, along with robust targets and a contingency plan should the targets not be achieved.
- 4.5 In most cases the Travel Plan itself will be secured by a condition and further details are provided in **Sections 8 & 9**.
- 4.6 It should be noted that a Travel Plan cannot be expected to turn a wholly unsustainable site in transport terms into a sustainable one.

#### **Travel Plan Statements**

- 4.7 Where the threshold for Travel Plan Statements is met, the full statement should be submitted alongside the planning application. A standard template is provided in **Appendix A** to assist developers. It is recommended that the full Travel Plan approach be embraced and many of the features of a full Travel Plan outlined throughout this document may offer benefits to individual organisations.

**Figure 1 - The Travel Plan Process**





## 5.0 **Recommended Travel Plan Components**

- 5.1 The actual content of the Travel Plan should reflect the local circumstances and nature of the site, to enable a site-specific Travel Plan to be developed. However, all Travel Plans should follow the key elements presented below.
- 5.2 **Introduction.** This should provide an overview of the site, development proposals, context and background for the travel plan.
- 5.3 **Background.** Detail of the development, the intended use, the organisation, number of staff / people etc. This section would link to the details contained within the Transport Assessment.
- 5.4 **Policy Context.** It is important that the travel plan is developed within the context of both national and local policies and guidance. As such, a review of relevant policies should be provided within the travel plan.
- 5.4 **Overview of Site.** This should include the travel requirements of the organisation / development, details of the number of trips generated and the site accessibility, as well as any constraints or opportunities. This section would link closely to the Transport Assessment, including any information or data pertaining to the site and the existing or forecast travel patterns.
- 5.5 **Aim and Objectives.** What the Travel Plan is trying to achieve in broad terms relative to economic, social or environmental factors. They should be specific to the site, but align with the policies, initiatives and targets of the Local Transport Plan and development framework.
- 5.6 **Targets.** The travel plan should identify appropriate targets against which the effectiveness of the measures / actions will be reviewed and monitored (including short, medium and long term). Targets should be **SMART** (**S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**ime-bound) and should measure the outcomes to be achieved by the Travel Plan (i.e. the difference it has made to the site users travel habits).

Targets should be informed by the Transport Assessment and agreed with the Transport Development Control Team. It is recommended that a 10% reduction in single occupancy vehicle trips over a five year period should be included as a target within the Travel Plan.

- 5.7 **Initiatives / Actions.** A clear description of the initiatives proposed to encourage sustainable travel, reduce car dependence and achieve the stated targets and objectives should be provided. These should be informed by the results of the site audits, staff surveys and good practice guidelines; further details on the type of measures that could be considered is included in **Appendix B** and **section 6**.

The most effective Travel Plans contain a mixture of *incentives* to encourage alternatives to single occupancy car use and *disincentives* to discourage unnecessary use of the car; it is beneficial to introduce the incentives first and disincentives later, to encourage support for the travel plan.

- 5.8 **Action Plan.** A strategy for implementation of the Travel Plan outlining **what** actions will be taken, **when** they will be delivered and **who** will be responsible

for their delivery. This will include identifying the name and contact details of the Travel Plan Co-ordinator who is responsible for managing, delivering and promoting the Travel Plan, liaising with the Council and providing monitoring information when agreed. Further details on the Action Plan are provided in **Appendix C**. A commitment will need to be provided to the implementation of travel plan initiatives and monitoring against targets.

5.9 **Monitoring.** A clear monitoring regime needs to be included and should outline, but not be limited to, the following:

- When monitoring will take place;
- The nature of the internal review process with responsibilities clearly identified;
- The infrastructure (if any) required for monitoring;
- How progress towards achieving targets and milestones will be reported;
- How monitoring will inform future reviews of the Travel Plan;
- A commitment to allow monitoring and partnership working;
- For larger sites, a commitment to assessment conforming to the Standard Assessment Methodology (based on the TRICS system) and provision for the associated costs.
- A contingency strategy, should the travel plan not be achieving the desired targets.

The monitoring regime needs to be agreed with the Council for the purposes of enforcement and to ensure the success of the Travel Plan. Further details of monitoring are included in **Section 7**.

5.10 **Communication Strategy / Promotion.** A strategy should be outlined providing information on how the Travel Plan will be communicated and promoted to employees, visitors, residents and service users. It is vital that successes are communicated to ensure continued buy-in is achieved from all service users and support is gained for its ongoing implementation.

5.11 **Management.** Details of how the travel plan will be managed should be outlined within the document. This should outline the role and responsibilities of the Travel Plan Coordinator and other stakeholders involved in implementing the travel plan.

5.12 **Evaluation / Enforcement.** It is important to evaluate a Travel Plan, both during its creation and on a regular basis during its implementation and development to ensure it remains up-to-date and relevant. Further details are provided in **Section 7**.

Consideration should be given to the means by which the plan will be enforced; further details on enforcement are included in **Section 9**.

## **6.0 Travel Plan Initiatives and Management**

- 6.1 A Travel Plan should include a package of measures and initiatives aimed at encouraging walking, cycling and public transport as well as reducing the use of motorised vehicle journeys.
- 6.2 For a Travel Plan to be effective, a range of measures should be chosen so as to work together as a single strategy aimed at delivering the Plan's aim and objectives. Careful consideration needs to be given in the early stages so that the site layout and facilities are designed to encourage and facilitate the provision of the site's infrastructure to enable these measures to be implemented.
- 6.3 Examples of Travel Plan measures that could be used in developing Travel Plans are provided in **Appendix B**, which is intended as a toolkit to assist the preparation of the Travel Plan. The lists are neither prescriptive nor exhaustive, and additional measures suggested by the developer are encouraged.
- 6.4 The initiatives selected should be appropriate to the site, dependant on the characteristics of the site and occupier, and should be informed by the results of the site audits and staff surveys.
- 6.5 A commitment must be provided to appoint a Travel Plan Coordinator to manage the implementation of the travel plan at the site. The name and contact details of the Travel Plan Coordinator should be provided within the document.
- 6.6 For framework travel plans, it is likely that the name and contact details of the Travel Plan Coordinator will be unknown at the time of writing. As such, the department / role responsible for implementing the Travel Plan should be identified, alongside a commitment to provide the name and contact details for the Travel Plan Coordinator following appointment.
- 6.7 The role of the Travel Plan Coordinator should be outlined within the Travel Plan. Within residential Travel Plans, details of how the Travel Plan will be managed after the developer is no longer on site should also be outlined; this could be achieved through a Travel Plan Steering Group.
- 6.8 Details of how the Travel Plan Coordinator role will be delivered should also be included within the Travel Plan. This should include details of whether the post is full- or part-time, on- or off-site etc. Details of how the role will be funded should also be provided.
- 6.9 Whilst it is appreciated that it may not be possible to set out a budget for the Travel Plan, given the number of unknowns, details of how the Travel Plan will be funded should be outlined within the document.

## 7.0 Evaluation

- 7.1 The Transport Development Control Team will assess the final Travel Plan using the evaluation table contained in **Appendix D** and provide comprehensive feedback on the content, acceptability and, if necessary, suggested alterations. The evaluation is based on the **TRACES** evaluation criteria as summarised in **Table 3**.

<b>Table 3: TRACES Evaluation Criteria</b>	
<b>Transparent</b>	Plans should clearly identify who is responsible for each of the various elements of the plan, how it will be financed and how the targets have been developed.
<b>Realistic</b>	Plans should set realistic but stretching targets which reflect the Local Development Framework (LDF) and Local Transport Plan (LTP) policies and the likely make-up of new occupiers/residents. Targets should take account of previously adopted experience of sustainable transport choices (e.g. in response to Travel Plans and personalised travel planning) and current best practice.
<b>Achievable</b>	Plans should only include measures that developers and partners in the process are capable of delivering and which are likely to have a positive impact on travel behaviour.
<b>Committed</b>	Plans need clear commitment from the applicant / developer / occupier for the period of implementation and beyond. The appointment of a Travel Plan Co-ordinator and identification of funding are typical means of demonstrating this commitment.
<b>Enforceable</b>	The commitments established in the plan need to be enforceable by the Council against the accompanying S106 Agreement or planning condition. This demands precision and clarity in the way measures are set out in the Travel Plan.
<b>Sustainable</b>	Plans need to demonstrate how they will be managed in the longer term. This includes specifying arrangements for the transition of responsibility for the plan from the developer to the occupier, residents or other organisations and the continuous sources of funding for the plan.

## **8.0 Implementation, Review & Monitoring**

- 8.1 The scope of the Travel Plan should be discussed at pre-application stage and should be considered as part of the preparation of any necessary Transport Assessment / Transport Statement. This will enable an overall transport strategy considering travel, access and parking issues to be developed for the site. This initial scoping process and the subsequent findings of the Transport Assessment should allow the preparation of a Travel Plan Framework, which should address all issues required to an appropriate standard and which will form the basis of the final Travel Plan document.
- 8.2 Unlike the preparation of a Transport Assessment, the development of a Travel Plan is not a one-off exercise that can be carried out to secure planning permission. Commitment to the Travel Plan involves committing to an on-going process of implementation, monitoring and review in partnership with the Council.
- 8.3 The implementation of the Travel Plan itself will normally be secured through a planning condition, as will any initiatives that can be implemented prior to the occupation of the site (e.g. cycle parking provision, specific improvements to design / layout / infrastructure etc). However, in some circumstances, the Travel Plan may be secured via a S106 Agreement or Unilateral Undertaking, particularly if the production of the Travel Plan has been used as a reason to reduce the trip generation and modal share figures within the Transport Assessment to minimise the impact on the surrounding highway network.
- 8.4 Sanctions will be identified within the S106 Agreement to address non-compliance and a commitment will be required to assessment conforming to the Standard Assessment Methodology (based on the TRICS system) and provision for the associated costs. Further details of the TRICS Standard Assessment Methodology is available at [www.trics.org](http://www.trics.org)
- 8.5 The standard wording for conditions is detailed in **Appendix E**; however, the Transport Development Control Team reserve the right to alter the wording of any conditions to meet the context of the development and site. Wording for S106 Agreements will depend on the nature of the Travel Plan and the associated targets and measures.
- 8.6 Effective monitoring of the targets identified within the Travel Plan is critical to the success of the plan and, irrespective of the means of securing the Travel Plan, the monitoring process must be clearly defined. This will involve independent analysis of the trip rates and modal split targets. This should be conducted on a regular basis for the lifetime of the development and must be funded by the organisation responsible for the Travel Plan. Larger sites may require a commitment to funding more detailed ongoing assessment conforming to the Standard Assessment Methodology (based on the TRICS system) which will require additional financial commitment.
- 8.7 The organisation responsible for the Travel Plan should conduct a review process that includes annual travel surveys and analysis of other data (e.g. cycle locker use, car park use, modal split etc.) to ensure that the Travel Plan is being implemented effectively.

- 8.8 An annual progress report should be submitted to the Council for five years from the first occupation of the site. As a minimum, this should contain recent information on travel modal split to and from the site, details of the specific target results, use of measures implemented. The monitoring report should be provided to the Council within 3 months of the survey being undertaken.
- 8.9 A 10% reduction in the number of single occupancy vehicle trips to the site is considered a realistic target over a five year period of travel plan implementation. Should this target be achieved prior to the five year timescale, the level of single occupancy vehicle trips should be retained at this level or further reduced.
- 8.10 A contingency plan should be outlined within the travel plan, outlining a range of initiatives to be implemented should the travel plan not be achieving the targets set.
- 8.11 The Council are responsible for the initial review of the Travel Plan and for subsequent supervision of the Travel Plan process. The Council will charge for this review and supervision element of monitoring a Travel Plan. Details of the costs involved are provided in **Section 9**.

## **9.0 Enforcement, Fees & Payments**

- 9.1 The Council is responsible for the general supervision of Travel Plans and Travel Plan Statements within the borough and will charge **an upfront fee of £3,000 plus VAT per Travel Plan** (consisting of £500 plus VAT for the initial review of the Travel Plan and £500 plus VAT for each of the first 5 years of the operation of the Travel Plan). For a Travel Plan Statement, **£500 plus VAT** will be charged, encompassing the duration of the statement. The fees are aside from any other sums payable for the ongoing assessment required within the Travel Plan and any other sums agreed for infrastructure, services and amenities.
- 9.2 These fees will contribute towards the cost of recording the monitoring details, producing reports, identifying key areas for improvement and enabling better partnership working across the borough.
- 9.3 The Council also offer accessibility modelling which can demonstrate the accessibility of a site by walking, cycling and public transport. This service is available at a fee of £450 plus VAT per report. For further information regarding the accessibility mapping, or to commission mapping, please contact the Transport Development Control Team (contact details are available at the end of the document).
- 9.4 Fee levels will be reviewed regularly and are subject to change.
- 9.5 The Council will be responsible for initiating remedial action from the organisation responsible, should the Travel Plan targets not be met.
- 9.6 Any failure to deliver agreed measures and / or outcomes will need to be remedied and this may be achieved through a number of forms:
- i. Payment to the Council to implement previously agreed measures or take other actions to achieve the agreed outcomes.
  - ii. A commitment to implement agreed alternative measures.
- 9.7 If a condition is used to secure the Travel Plan, the Council can seek to enforce that condition to ensure that it is complied with.
- 9.8 If the Travel Plan has been secured via a S106 Agreement, default mechanisms will be included detailing sanctions for non-compliance so that all parties are clear what may occur if targets, measures or implementation are not adhered to.
- 9.9 If, during the course of implementing a Travel Plan, there is disagreement between the occupier and the Council over whether targets are being met then an arbitrator shall be approached. The arbitrator should be competent in legal matters, familiar with the Travel Plan process and acceptable to both parties. The outcome of any arbitration shall be binding to both parties.

**Appendix A                    TRAVEL PLAN STATEMENT TEMPLATE**

Name of Development: \_\_\_\_\_

Address of Development: \_\_\_\_\_

\_\_\_\_\_ Postcode \_\_\_\_\_

Description of Development: \_\_\_\_\_

\_\_\_\_\_

Number of Units / Gross Floor Area: \_\_\_\_\_

Existing and / or Expected Staff / Visitor / Customer / Pupil numbers: \_\_\_\_\_

No. of car spaces: \_\_\_\_\_ No. of disabled spaces: \_\_\_\_\_

No. of motorcycle spaces: \_\_\_\_\_ No. of cycle spaces: \_\_\_\_\_

**Contact Details**

Contact details for the person ultimately responsible for delivering the details in this Travel Plan Statement

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postcode \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

If this is a speculative development, the person named above will ensure this document is passed on to the occupier and that the measures are implemented.

**Travel Plan Objectives**

**The purpose of this Travel Plan Statement is to reduce single occupancy vehicle trips to and from the site.**

*Additional relevant Objectives can be selected from the following list*

- Improve health and wellbeing, and reduce absenteeism from ill health
- Reduce / eradicate parking problems
- Reduce stress levels
- Reduce CO2 emissions



- Reduce congestion
- Meet environmental objectives
- Demonstrate corporate social responsibility
- Ensure everyone is well informed of their sustainable travel options to the site
- Contribute to BREEAM rating

### Action Plan

Select the **relevant** sections from the list below and **populate specific measures** from **Appendix B**, and complete all columns.

<b>Actions and Measures to cover all site users</b>	<b>Date to Deliver</b>	<b>Person Responsible</b>
Promote Walking		
Promote Cycling		
Promote Public Transport		
Promote Car Sharing		
Reduce the Need to Travel		
Promote Car Clubs		
Provide Shuttle Bus		
Promote Motorcycling		
Promote Alternatively Fuelled Vehicles		
Fully promote sustainable travel options		
<b>Commitment to the Council to allow monitoring and partnership working to improve the Travel Plan process in St Helens* (please sign)</b>		

**\*This is a mandatory requirement of an acceptable Travel Plan Statement**

**Workplaces**

**Site Design**

Access and permeability for pedestrians and cyclists  
Pedestrian and cycle friendly infrastructure  
Highway safety measures  
Site speed limits  
Provision of sustainable travel facilities on-site

**Reducing the need to travel / alternative working practices**

Tele-working / remote working / home working  
Tele-conferencing / video-conferencing  
Compressed working week (9 day fortnight)  
Publicising Travel Plan when recruiting (e.g. through distributing 'how to get to guides' alongside interview notifications)  
Relocation packages  
Induction Travel Plan pack  
Adopting a local recruitment policy where possible

**Walking**

Improved footpath / footway network provision  
Improved footpath / footway network maintenance  
Improved sign posting  
Provision of local route maps to staff  
Provision of showers / changing / locker facilities  
Distribution of / loan scheme for umbrellas / rainproof clothing  
Provision of personal alarms  
Setting up a walking buddi scheme or lunchtime walking group  
Promotional material and events  
Organising organised walks

**Cycling**

Improved cycle network provision  
Improved cycle network maintenance  
Provision of secure cycle parking  
Provision of showers / changing / locker facilities  
Provision of local route maps to staff  
Sign posting  
Interest free loans to buy cycles / equipment  
Introduction of cycle mileage rates  
Procurement of discounts from local shops  
Establishment of Bike User Group (BUG)  
Provision of a cycle hire or cycle loan scheme  
Doctor Bike and other support e.g. training  
Promotional material and events

### Car sharing

- Set up a car share database
- Coffee mornings (to find partners)
- Reserved parking spaces for car sharers near to entrance
- Free / cheaper parking for car sharers
- Guaranteed ride home in the event of an emergency
- Promotional material and events

### Public transport

- Provision of train and bus information to site users
- Discounted tickets made available to site users
- Interest free season ticket loans
- Improvements to existing services
- Improvements to existing public transport infrastructure (e.g. bus stop improvements)
- Provision of work buses / shuttle buses
- Guaranteed ride home in the event of an emergency
- Promotional material and events

### Powered two wheel vehicles

- Provision of secure motorcycling / scooter parking
- Provision of showers / changing / locker facilities
- Interest free loans to buy vehicles and equipment

### Car park management

- Car park permit scheme
- Car park exclusion zone
- Car park charging (not annual so as to not *lock* people into one travel mode)
- Parking cash-out (cash allowance instead of providing a parking space)
- Provision of an electric vehicle charging point

### Fleet management

- Review of company car policy
- Car / van pooling / drive share
- Providing memberships to car clubs
- Reduction of business mileage
- Review of mileage rates
- Driver training to encourage eco-driving
- Provision of pool cars or car clubs

### Fleet vehicles

- Use of efficient or electric vehicles
- Use of clean fuels
- Review company car policy
- Pool bikes

### Promotional initiatives

- Providing a Personalised Travel Planning service
- Travel plan promotional events and activities
- Promote journey planning websites (e.g. Traveline)

## Deliveries

Rationalisation of deliveries to minimise the number of vehicle trips made to / from the site  
Use of local suppliers to minimise the distance travelled.

## **Residential**

### Site Design

Ensuring site permeability for pedestrians and cyclists  
Pedestrian and cycle friendly infrastructure provision  
Highway safety measures  
Site speed limit reductions  
Minimising intrusion from parking  
Cycle parking on site and in home  
Appropriate road design to allow bus penetration and connectivity  
Bus infrastructure such as stands, stops, shelters, access kerbs, bus gates, real-time information  
Home zone principles

### Improvements to off-site access

Road safety improvements on the surrounding highway network  
Creation and enhancement of cycling and walking infrastructure  
Provision of off-site infrastructure such as stands, stops, shelters, access kerbs, bus gates, real-time information  
Bus priority measures

### Facilities that reduce the need to travel

Shopping / home delivery – e.g. convenience store, cool storage areas for collection of groceries  
Provision of a secure internet connection to dwellings to enable home working  
Promoting online services (e.g. internet shopping)

### Public transport improvements

New or enhanced public transport services  
Facilities to improve interchange (e.g. cycle parking / lockers at stations)  
Improved access to public transport information

### Car club

Service established on site and promoted to residents  
Allocation of parking bays

### Other services to support sustainable travel

Providing contact details for taxi services  
Bicycle user group  
Set up and run a car share scheme  
Community travel forum / website / noticeboard

Provision of cycle / walking maps to residents  
Provision of free / discounted cycles and equipment  
Provision of discounted tickets / taster tickets on public transport  
Promoting use of car club  
Personal travel advice  
Information about access to services, facilities and public transport  
Travel welcome packs  
Travel plan training for sales / marketing staff  
Providing an electric vehicle charging point

## **Schools**

### Walking

Setting up and running walking bus schemes  
Identification of safer walking routes  
Provision of lockers for pupils to store books / bags  
Setting up a park & walk scheme  
Running walking campaigns  
Providing shelter for walking parents

### Cycling

Running cycle training courses  
Identify and promote safer cycle routes  
Provision of secure cycle storage  
Offering free biker's breakfasts to pupils / staff who cycle to school  
Provision of showers / changing / locker facilities  
Provision of helmets & bright clothing  
Bike clinic & bike parts swap shop  
Running cycle campaigns  
Setting up cycle trains  
Discounts at local bike shops

### Public transport

Promoting use of bus and rail  
Additional school buses  
Concessionary bus fare schemes  
Private minibuses from areas where there are a number of students travelling

### Car Use

Providing a drop-off point away from school gate  
Prohibiting cars from school gate area

### Highway Measures

Installing 20mph zones outside schools  
Priority measures for school buses  
Providing safe crossings outside schools & along routes  
Providing cycle lanes and cycle tracks  
Undertaking junction narrowing / parking reorganisation  
Providing school crossing patrols

## School Management Issues

Introduce school policies on travel

## Training

Providing pedestrian training

Providing cyclist training

Providing parent escort training

Running initiatives to promote wearing cycle helmets

Road safety curriculum work / school assemblies to promote sustainable travel

Educating pupils on safe route planning

Undertaking promotional work

**Appendix C**

**Action Plan Guidance**

**Action Plan Template**

<b>Objective</b>	<b>Target</b>	<b>Action / Measure</b>	<b>Timescale</b>	<b>Responsibility</b>	<b>Monitoring</b>	<b>Cost</b>
Set out clear objectives – these assign what you want the Travel Plan to achieve and should be linked to the policies, initiatives and targets of the Unitary Development Plan, Local Development Framework and / or Local Transport Plan.	Set SMART targets – Specific, Measurable, Achievable, Realistic, Timed – these should be set against baseline data to which future performance can be measured.	Include a range of long and short term measures to help achieve the Travel Plan’s objectives and targets.	Actions should have a timescale, list the month and year that the action will be implemented or completed.	Each action should have a named contact for responsibility – this may not always be the lead Travel Plan Co-ordinator.	A commitment to feedback to the Council in line with the timescales listed including details of monitoring costs.	How much the action/measure will cost and how it is to be funded.





## Action Plan Example

Objective	Target	Action / Measure	Timescale	Responsibility	Monitoring	Cost
To encourage staff to travel more sustainably	To see a 5% increase in the number of employees cycling to work by July 2016	Set up a bicycle user group	May 16	Travel Plan Co-ordinator	Group to report back to Travel Plan Co-ordinator	State budget and source of funding
		Set up a cycle to work scheme	By July 2016	Travel Plan Co-ordinator / Finance Manager	Update Council with progress and details	State budget and source of funding
		Install secure cycle shelters	By July 2016	Site Manager	Inform Council when installed; discharge planning condition	State budget and source of funding
		Regular cycling promotion days (every 3 months or so)	Commencing April 2016, July 2016, October 2016	Travel Plan Co-ordinator	Details of attendance, staff feedback forms	State budget and source of funding
To reduce the number of single occupancy vehicles entering the site	To have 40% of vehicles entering the site non SOV by November 2016	Implement a green travel to work scheme	By July 2016	Travel Plan Co-ordinator / Finance Manager	Update Council with progress and details	State budget and source of funding
		Set up a carshare database	By November 2016	Travel Plan Co-ordinator / Merseyside carshare contact	Update Council with progress and success based on number of members and matches made	State budget and source of funding
		Provide priority parking spaces to car-share staff	By November 2016	Site Manager / Parking Manager	Numbers of spaces allocated	£xxxx to mark out bays and allocated passes



## Consultation and partnerships

Does the plan demonstrate that staff, unions and HR have been (or will be) involved in the preparation of the plan? Have the opinions of those who will be affected (including the local community) been included in the action plan?

T,R

Is there agreement with the highway / transport authority on the measures relevant to them? Evidence of liaison with the local authority.

T,R,A

Is there agreement with the local public transport operators on measures relevant to them?

T,R,A

Are any other key partnerships identified (e.g. cycle retailers, train operators) or is there membership of a commuter forum?

T,C,A

## Site and travel surveys

Have site audits been undertaken?

T,C

Have surveys been carried out of existing transport links and public parking stock (i.e. is there potential for displaced parking to take place)?

T,C

Have travel surveys been undertaken / planned (staff, visitors, customers etc)? If so, what is the response rate / data quality?

T,C

Has an appropriate survey methodology been proposed and agreed including timescales?

T,A,C

Is a sample survey questionnaire provided?

T,A,C

What level of data analysis has been used to inform the development of the action plan (reference to local or national data)?

T,C

Are patterns of staff / visitor travel outlined?

T

## Visions, Objectives and Targets

Does the plan have clear and appropriate overall aims and objectives?	T,R,A,C
Does the plan have targets (related to the aims and objectives)? Minimum of % SOV versus other modes	
Are there 'aim' and 'action' type targets?	T,R,A,C
Is the plan clear about how the targets have been developed (e.g. are they based on evidence like survey results)?	
Are the targets SMART?	T,R,A
Are indicators of success proposed?	T,R,A
Are the targets consistent with LDF and LTP objectives and policies?	T,R

## Action Plan

Has an action plan been included?	T
Is it clear how initiatives and measures support the overall aims and objectives?	T,R
Are measures related to survey results or in line with overall aims and objectives?	T,R
Do actions have defined and realistic timescales?	T,R,A
Are initiatives and measures prioritised in the plan?	R,A
Are there details of who is responsible for each action?	T,R,A
Are all modes of travel to the site considered (walking, cycling, bus, train, taxi, motorbike, multimodal journeys, car, car share, deliveries)?	T,C
Are measures identified to assist all users of the site and all journey types?	T,C
Provision of marketing / information for each mode	R,A,C

Provision of incentives for each mode	R,A,C
Is there a strong car parking policy (e.g. to what extent is car parking managed to promote car sharing and reduce SOV trips)?	R,A,C
Are non transport solutions considered (e.g. flexible working hours, working from home, teleconferencing)?	R,A,C
<b>Evaluation and Monitoring</b>	
Does the plan state when the next survey will be undertaken?	T,S
Are there mechanisms in place for reviewing and updating the plan in light of experience?	T,S
Are barriers to implementation discussed with amelioration measures proposed?	T,R,A
Are proposals for long term monitoring included?	T,S
Are the proposals for implementing and managing the plan in the longer term (5-15 years) clear?	T,S
<b>Roles and responsibilities</b>	
Is there a steering group to oversee the development of the plan with working groups to assist in delivering the plan (where appropriate)?	T,C
Are staffing implications of delivering the plan made clear?	T,A,C
Is there support and commitment from senior management?	T,C
Is a Travel Plan Co-ordinator in place or is there agreement on when a Co-ordinator will be in place?	T,C
What is the level of seniority of the Travel Plan Coordinator? Will it be a full or part time role?	T,C

## **Awareness, promotion and marketing**

What measures are in place to ensure that the travel plan is promoted over a sustained period of time (e.g. newsletters, events, websites)?

A,C,S

Are promotional events coordinated with national and local events?

R,A

Is there a mechanism for disseminating the results of the survey?

T

## **Funding**

Are sources of funding (at an appropriate scale) identified for delivery of the action plan?

T,R,C

Is the funding of the Travel Plan Co-ordinator role clear?

T,R,C

Is there funding allocated for promotional events and marketing?

T,R,C

Is funding allocated for the requirement of ongoing monitoring of the plan?

## **Deliverability / Enforceability**

Are conditions or a Section 106 agreement drafted which ensure delivery of the travel plan?

T,E

Is there clarity on what needs to be done within agreed timescales and appropriate incentives / sanctions in place to enforce the agreement?

T,E

Is the travel plan explicit in terms of objectives, management, monitoring and review?

T,E

Are there transition arrangements in place for changes in user / owner / occupier?

T,E,S

## Residential Development:

Criteria Brief assessment / cross reference to plan TRACES\*

### Background

Name of residential development (developer / agent / speculative development status)

T

Numbers and types of dwellings

T

Are there other on-site facilities available? Customer/visitor movements

T

Is the scope of the plan clear and does the plan relate to the different needs of all residents, visitors, deliveries, disabled access?

T,R,A

Is there reference to the wider company ethos (if managed housing)?

T,R

Physical description of the site and its location. To include on-site infrastructure (e.g. car parking spaces) and off-site infrastructure (e.g. public transport services)

T

Is the plan clear about who has responsibility to deliver the travel plan (the developer or responsibility passed to the residents groups)?

T,R,C

### Consultation and partnerships

Does the plan demonstrate that residents will be involved in the development of the plan? Have the opinions of the local community and stakeholders been included in the action plan?

T,R

Is there agreement with the highway / transport authority on the measures relevant to them? Evidence of liaison with the local authority should be included within the Travel Plan.

T,R,A

Is there agreement with the local public transport operators on measures relevant to them?

T,R,A

Are any other key partnerships identified (e.g. cycle retailers, train operators) or is there membership of a commuter / local residents' forum?	T,C,A
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**Site and travel surveys**

Have site audits been undertaken?	T,C
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Have surveys been carried out of existing transport links and public parking stock (i.e. is there potential for displaced parking to take place)?	T,C
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Have travel surveys been planned. If so, what response rate / data quality is anticipated?	T,C
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Has an appropriate survey methodology been proposed and agreed including timescales?	T,A,C
--	-------

Is a sample survey questionnaire provided?	T,A,C
--	-------

What level of data analysis has been used to inform the development of the action plan (reference to local or national data)?	T,C
---	-----

Are likely patterns of resident / visitor travel outlined?	T
--	---

**Visions, Objectives and Targets**

Does the plan have clear and appropriate overall aims and objectives?	T,R,A,C
---	---------

Does the plan have targets related to the aims and objectives? Minimum of % SOV versus other modes Are there 'aim' and 'action' type targets included?	T,R,A,C
--	---------

Is the plan clear about how the targets have been developed (e.g. are they based on evidence from similar sites)?	T,R,A
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Are the targets SMART?	T,R,A
------------------------	-------

Are indicators of success proposed?	T,R,A
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Are the targets consistent with LDF and LTP objectives and policies?	T,R
--	-----



## Action Plan

Has an action plan been included?	T
Is it clear how initiatives and measures support the overall aims and objectives?	T,R
Are measures related to survey results or in-line with overall aims and objectives?	T,R
Do actions have defined and realistic timescales?	T,R,A
Are a range of appropriate measures included in the site design?	
Are initiatives and measures prioritised in the plan?	R,A
Are there details of who is responsible for each action?	T,R,A
Are all modes of travel to and from the site considered (walking, cycling, bus, train, taxi, motorbike, multimodal journeys, car, car share, deliveries)?	
Are measures (physical and promotional) identified to assist all users of the site and all journey types?	T,C
Provision of marketing / information for each mode	T,C
Provision of incentives for each mode	
Is there a strong car parking policy (e.g. to what extent are residents and visitor car parks managed)?	R,A,C
Are non transport solutions considered (e.g. are homes wired for broadband internet, are there opportunities to provide work hubs)?	
	R,A,C

## Evaluation and Monitoring

Does the plan state when surveys will be undertaken?	T,S
Are there mechanisms in place for reviewing and updating the plan in light of experience / progress?	T,S
Are barriers to implementation discussed with amelioration measures proposed?	T,R,A
Are proposals for long term monitoring included?	T,S
Are the proposals for implementing and managing the plan in the longer term (5-15 years) clear? e.g. residents groups	T,S

## Roles and responsibilities

Is there a steering / management group to oversee the development of the plan?	T,C
Have sales staff been trained and provided with information about promoting the travel plan?	T,C
Is a Travel Plan Co-ordinator in place or is there agreement on when a Co-ordinator will be in place. Will it be a full or part time role?	T,C
Are staffing implications of delivering the plan made clear, especially when the developer will not have a continued presence on site?	T,A,C

## Awareness, promotion and marketing

What measures are in place to ensure that the travel plan is promoted over a sustained period of time (e.g. newsletters, events, websites)?	A,C,S
Are promotional events coordinated with national and local events?	R,A
Is there a mechanism for disseminating results of the survey?	T

## **Funding**

Are sources of funding (at an appropriate scale) identified for delivery of the action plan?

T,R,C

Is the funding for the Travel Plan Co-ordinator role clear?

T,R,C

Is there funding allocated for promotional events and marketing?

T,R,C

Is funding allocated for the requirement of ongoing monitoring of the plan?

## **Deliverability / Enforceability**

Are conditions or a Section 106 agreement drafted which ensure delivery of the travel plan?

T,E

Is there clarity on what needs to be done by when and appropriate incentives / sanctions in place to enforce the agreement?

T,E

Is the travel plan explicit in terms of objectives, management, monitoring and review?

T,E

Are any arrangements in place for change in ownership of properties?

T,E,S

**All cases:**

The development shall not be occupied until the owners and occupiers of the site have appointed a Travel Plan Co-ordinator. The Travel Plan Co-ordinator shall be responsible for the implementation, delivery, monitoring and promotion of the Travel Plan, including the day-to-day management of the steps identified to secure the sustainable transport initiatives. The details (name, address, telephone number and email address) of the Travel Plan Co-ordinator shall be notified to the Council as Local Planning Authority upon appointment and immediately upon any change.

*Reason:* To ensure that the approved Travel Plan is implemented, in order to establish sustainable, non-car modes of transport; in accordance with Policies S7 – Sustainable Development, GEN 1 – Primacy of the Development Plan, GEN 9 – Parking and Servicing of the adopted Unitary Development Plan.

**Standard Travel Plan:**

Within 3 months of the development being brought into use <The development shall not be brought into use until> a Travel Plan shall be <has been> submitted to and approved in writing by the Council as Local Planning Authority. The Plan shall include immediate, continuing and long-term measures to promote and encourage alternative modes of transport to the single-occupancy car. For the avoidance of doubt, the Travel Plan shall include, but not be limited to:

- a) Involvement of employees
- b) Information on existing transport policies, services and facilities, travel behaviour and attitudes
- c) Access for all modes of transport
- d) Targets for mode share
- e) Resource allocation including Travel Plan Co-ordinator and budget
- f) A parking management strategy
- g) A marketing and communications strategy
- h) Appropriate measures and actions to reduce car dependence and encourage sustainable travel
- i) An action plan including a timetable for the implementation of each such element of the above
- j) Mechanisms for monitoring, reviewing and implementing the travel plan

The Approved Travel Plan shall be implemented in accordance with the timetable contained therein and shall continue to be implemented as long as any part of the development is occupied and in use.

An annual report shall be submitted to the Council no later than 1 month following the anniversary of the first occupation of the development for a period of 5 years. The annual report shall include a review of the Travel Plan measures, monitoring data and an updated action plan.

*Reason:* To maximise opportunities for travel by modes of transport other than the private car, and to ensure that the development is sustainable; in accordance with Policies S7 – Sustainable Development, GEN 1 – Primacy of the Development Plan, GEN 9 – Parking and Servicing of the adopted Unitary Development Plan.

### **Residential Travel Plan:**

Prior to the occupation of any dwelling, a Residential Travel Plan shall be submitted to and approved in writing by the Council as Local Planning Authority. The Plan shall include immediate, continuing and long-term measures to promote and encourage alternative modes of transport to the single-occupancy car. For the avoidance of doubt, the Travel Plan shall include, but not be limited to, the following:

- a) Production and distribution of an information pack for residents detailing travel options and information for all modes of travel
- b) Information on existing transport policies, services and facilities, travel behaviour and attitudes
- c) Access for all modes of transport
- d) Resource allocation including Travel Plan Co-ordinator and budget
- e) A marketing and communications strategy
- f) Appropriate measures and actions to reduce car dependence and encourage sustainable travel
- g) An action plan including a timetable for implementation of each of the above
- h) Mechanisms for monitoring, reviewing and implementing the travel plan

The approved Residential Travel Plan shall be implemented in accordance with the timetable contained therein and shall continue to be implemented as long as any part of the development is occupied.

An annual report shall be submitted to the council no later than 1 month following the anniversary of the first occupation of the development for a period of 5 years. The annual report shall include a review of the residential Travel Plan measures, monitoring data and an updated action plan.

*Reason:* To maximise opportunities for travel by modes of transport other than the private car, and to ensure that the development is sustainable; in accordance with Policies S7 – Sustainable Development, GEN 1 – Primacy of the Development Plan, GEN 9 – Parking and Servicing of the adopted Unitary Development Plan.

### **School Travel Plan:**

The development shall not be brought into use, until a school Travel Plan has been submitted to and agreed in writing by the Council as Local Planning Authority in consultation with the Council's Road Safety and Travel Awareness Team and School Travel Plan Advisor. For the avoidance of doubt, the School Travel Plan shall include, but not be limited to the following:

- a) Allocation of a Travel Plan Coordinator at the school
- b) Involvement of the Head Teacher, staff, pupils, parents and governors
- c) Clearly defined targets and objectives for mode share
- d) Data obtained from staff and pupils
- e) Appropriate measures taken to improve and encourage sustainable travel
- f) An action plan including a timetable for the implementation of each element
- g) Annual reinforcement of the School Travel Plan by monitoring and review

*Reason:* To maximise opportunities for travel by modes of transport other than private car; in accordance with Policies S7 – Sustainable Development, GEN 1 – Primacy of the Development Plan, GEN 9 – Parking and Servicing of the adopted Unitary Development Plan.

## Appendix F

## Useful Links & Contacts

### Links

<http://www.sthelens.gov.uk/what-we-do/planning-and-building-control/transport-planning/transport-planning-development-control/> – The Council’s website contains guidance and information to assist developers.

[Smarter choices - Department for Transport](#) – The DfT website outlining techniques to influence people’s travel behaviour.

[Welcome to the TravelWise Merseyside website](#) – The Merseyside Travelwise website includes information relating to Travel Plans and sustainable travel options in Merseyside.

[Home \(United Kingdom\) - Energy Saving Trust](#) – The Energy Saving Trust includes a transport section related to saving energy and reducing carbon footprint. It also provides a *Travel Plan Resource Pack for Employers*.

<http://www.trics.org> - Details of the Standard Assessment Methodology for Travel Plans.

[www.traveline-northwest.co.uk](http://www.traveline-northwest.co.uk) – The Traveline website provides details of public transport services in Merseyside.

### Contacts

Transport Development Control Team – St Helens Council

Fiona Soutar, Principal Transport Officer – 01744 676187

Dave Whittleston, Senior Transport Officer – 01744 671615

Email – [planningtransport@sthelens.gov.uk](mailto:planningtransport@sthelens.gov.uk)