

Somerset County Council

Transport Policies

TRAVEL PLANNING GUIDANCE



PURPOSE OF THE DOCUMENT AND SUMMARY OF ENGAGEMENT	4
EXECUTIVE SUMMARY	5
1. INTRODUCTION	7
1.1 What are Travel Plans?	8
1.2 Relevant Local Policy	13
1.3 When are Travel Plans required in Somerset?	14
2. DELIVERING A TRAVEL PLAN THROUGH THE PLANNING PROCESS	22
2.1 The role of Local Authorities in Somerset	22
2.2 Preparation of Travel Plans	26
2.3 Gaining approval of Travel Plans as part of the planning application	29
2.4 Travel Plan Fees	30
3. PREPARING THE CONTENTS OF A TRAVEL PLAN	32
3.1 Linking Travel Plans, Design and Access Statements and Transport Assessments	32

3.2 Content of the Travel Plan	33
3.2.1 Site Audit Report	33
3.2.2 Action Plan	34
3.2.3 Monitoring Strategy	42
4. STANDARDS AND SPECIFICATIONS OF PHYSICAL ON-SITE INFRASTRUCTURE	46
4.1 Examples of likely physical Travel Plan measures for new developments	46
4.2 Responsibilities for maintaining external features	47
4.3 Parking for all modes of travel	49
4.3.1 Motorcycle parking specifications and examples	51
4.3.2 Cycle parking specifications and examples	53
5. SECURING TRAVEL PLANS	61
5.1 Procedure in the event of breach of Travel Plan commitments	63
5.2 Measures deliverable by the developer and the LHA in the event of breach	65
5.3 Role of the Highway Authority	67
5.4 Further Issues to Consider	68
6. IMPLEMENTING, MANAGING AND MONITORING THE TRAVEL PLAN	69

6.1 Long Term Management of the Travel Plan	69
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6.2 Monitoring the Travel Plan	69
---	-----------

ADDITIONAL INFORMATION, REFERENCES AND APPENDICES

AUTHORS, CONTRIBUTORS, ACKNOWLEDGEMENTS AND ABBREVIATIONS	72
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REFERENCES	75
-------------------	-----------

APPENDICES	76
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Purpose of the Document and Summary of Engagement

It is intended that the text within this document forms the basis of a Supplementary Planning Document (SPD) to be offered to Local Planning Authorities (the District Councils in Somerset) for adoption as part of their local development plans. It has been prepared by Somerset County Council (SCC) and has been adopted as formal SCC technical guidance under delegated powers by Councillor David Hall. This document has been informed by a series of working papers and early engagement with relevant stakeholders.

Table A shows the consultation that has taken place. Further formal consultation will take place during the adoption of any subsequent SPD by LPAs. This may result in local variations to this SCC adopted model document, in response to local feedback.

Dates	Activity	Outcome
15 th September 2009	LPA/LHA half-day workshop	Base document drafted by SCC based on high-level themes discussed/agreed
21 st October – 30 th November 2009	LPA consultation on 1 st draft (by email)	Responses to consultation used by SCC to produce 2 nd draft
22 nd January 2010	2 nd draft published online	Web link to 2 nd draft provided to LPA and developers for feedback
22 nd January – 26 th February 2010	Developer online consultation on 2 nd draft	Responses to consultation (2 developers replied out of 10 directly contacted) used by SCC to produce 3 rd draft
10 th February – 15 th March 2010	Face-to-face meetings between each LPA development control and forward planning representatives and SCC smarter choices team	Issues raised during LPA meetings used by SCC to produce 3 rd draft
April 2010 – November 2011	Document online on Moving Somerset Forward website as draft technical guidance prior to formal adoption	Amendments made in light of practical use and informal feedback to produce 4 th and 5 th drafts

Table A Summary of Engagement

Executive Summary

This document is a set of standards that is tied into local development plan and SCC's Future Transport Plan (see Table 1 of main document) to aid the delivery of travel plans through the planning process in Somerset.

This Policy Document sets out to ensure that proposed developments contribute to modal shift; defines the expected content of travel plans; aims to ensure that good quality cycle parking and other on-site physical facilities effectively support new development; sets a consistent process for the delivery of promised travel plan outcomes; and describes the overall process for efficient and predictable decisions for the development industry.

These standards are set out below.

- **TVS1.** Table 2 presents the thresholds that apply in requiring travel plans⁽¹⁾ in Somerset, as a result of the adoption of this guidance, and compares these to national indicative thresholds.
- **TVS2.** For relevant developments requiring a travel plan, the document should be submitted with the planning application and have been informed by pre-application discussions and technical feedback from the Local Highway Authority (LHA). Travel plans must show integration with the transport assessment, design and access statement, environmental statement and the proposed layout of the development.
- **TVS3.** Once travel plans are agreed and prior to their full approval by the LHA, applicants must enter the details of their travel plan onto iOnTRAVEL to enable the ongoing management and supervision of travel plans by the LHA.
- **TVS4.** To enable the LHA to monitor the progress of Full Travel Plans or Travel Plan Statements over the life of the development, applicants are required to pay a Travel Plan Fee where an appropriate legal agreement is being used to secure highways and/or travel plan measures according to a published schedule negotiated as part of the development process once planning permission has been granted
- **TVS5.** Full travel plans must demonstrably cover three topic areas:
 - A Site Audit Report giving information about the existing range of travel opportunities to and through a development site by all modes of travel
 - An Action Plan of new initiatives to improve travel options for staff, customers and visitors
 - A Monitoring Strategy providing a methodology and schedule for monitoring travel to and from a development site by all modes of travel including sets of approved modal share targets

1 Travel plan is a generic term referring to travel plans, travel plan statements, and measures-only travel statements as further described in this document. The requirements for following this guidance are necessarily more extensive for travel plans than travel plan statements or measures-only travel statements

- **TVS6.** 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.
- **TVS7.** 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.
- **TVS8.** 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.
- **TVS9.** Technical drawings and documents for full planning applications that are approved with the main body of the planning application must include physical measures from the travel plan. Outline applications must include detailed design principles relating to how these measures will be brought forward at the design stage.
- **TVS10.** Developers must provide a proportion of car parking spaces in employment sites for dedicated uses such as car sharing and low carbon vehicles with electric vehicle charging points to encourage employees to match trips and promote more sustainable travel, in line with targets set in the travel plan.
- **TVS11.** For employment developments, the supply of parking must be at levels relating to Countywide Parking Standards and managed both to meet targets for car, cycle and motorcycle use in the travel plan and to manage the demand for car travel
- **TVS12.** All new development, including residential development, must feature dedicated cycle and motorcycle parking approved the LHA in accordance with this guidance in advance of planning approval.
- **TVS13.** A Full Travel Plan schedule within s106 agreements will be used to secure the implementation of Full Travel Plans which must be agreed prior to the signing of the agreement. The LHA will be a signatory to these agreements.
- **TVS14.** Travel plans may be safeguarded with measures or funds (as bonds, ESCROW accounts or cash sums) to cover the achievement of travel plan outcomes in the event of default by the developer/land owner or occupier/leaseholder.
- **TVS15.** Permanent Automatic Traffic Counters must be installed at all developments exceeding the thresholds for Full Travel Plans. All developments must comply with the LHA's monitoring requirements in order to get consistent and comparable data over time across all developments with travel plans in Somerset.
- **TVS16.** A fresh, updated travel plan must be prepared and approved at the end of any monitoring period agreed as part of the planning permission for a development. This will lead to a Statement of Travel Plan Compliance being issued by the LHA.

1 Introduction

The purpose of this guidance is to help the development industry prepare high quality travel plans that provide sustainable and long-lasting outcomes, and for these to be fairly and consistently implemented within Somerset across Local Planning Authority (LPA) areas.

This document is aimed at developers, their agents (including planning and transport consultants, architects and urban designers), site travel managers/coordinators and local planning and highways authority officers in Somerset. It is focused on travel plans delivered through the planning process⁽²⁾.

This guidance covers:

- When a travel plan is required
- An outline of the expected content and when different types of travel plan are required
- The process of gaining travel plan approval
- Arrangements for the monitoring and ongoing auditing of travel plans
- Procedures for the effective operation and enforcement of travel plans
- The respective responsibilities of all the parties involved in developing, implementing and monitoring travel plans

This guidance should be used as a material consideration in the determination of planning applications. It is the aim of the document to explain how the quality of the travel plan can materially affect the acceptability of a planning application, and the role of travel plans in changing, controlling and managing the significance of transport implications.

For further information, please contact the Travel Plan Coordinator:

SomersetCounty Council

C7, County Hall

Taunton

TA1 4DY

01823 35 8079

2 Information on business travel plans adopted voluntarily by employers is available at www.movingsomersetforward.co.uk/business

Structure of the document

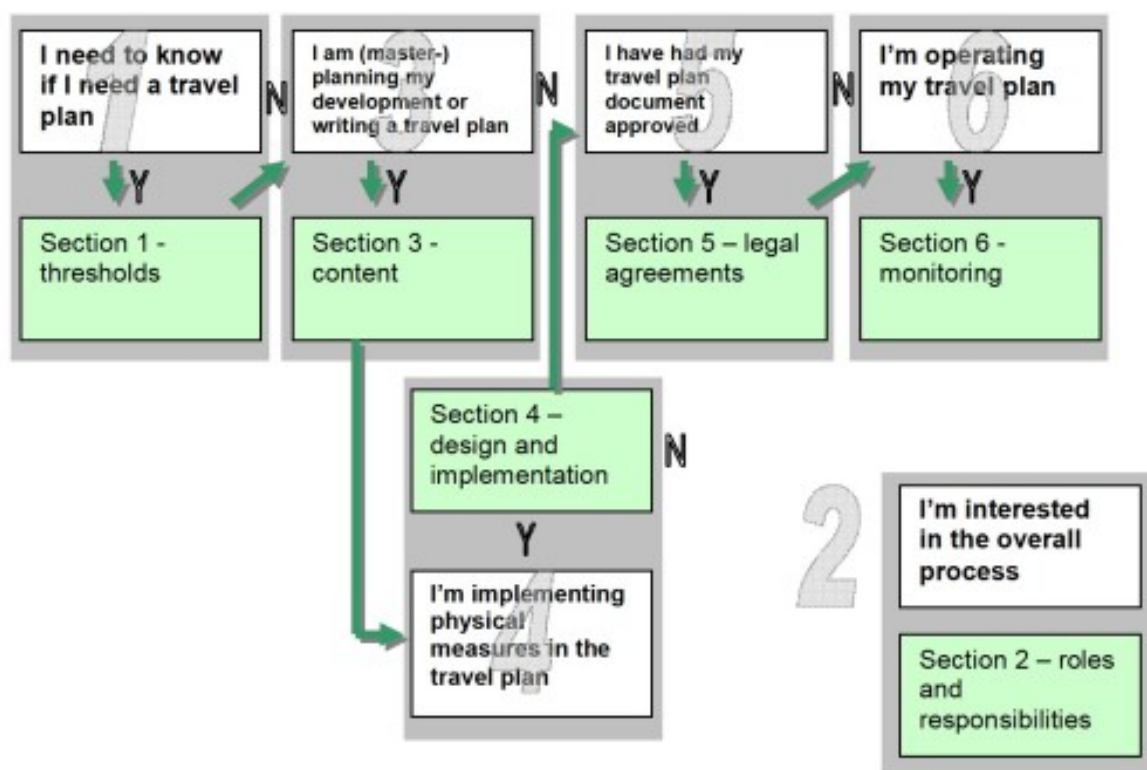


Figure 1.1 Structure of the Document

The structure of this document reflects a protocol for delivering travel plans through the planning process in Somerset is set out in the diagram above, as summarised below:

- **Section 1** deals with ensuring that proposed developments of different scales contribute to modal shift.
- **Section 2** sets out the overall process for efficient and predictable decision-making.
- **Section 3** sets out the expected content of different types of travel plan.
- **Section 4** ensures that good quality cycle parking and other on-site physical facilities support new development.
- **Section 5** sets out a consistent process for the delivery of promised travel plan outcomes.
- **Section 6** sets out monitoring expectations.

1.1 What are Travel Plans?

“A travel plan is a long-term management strategy for an occupier or site [development] that seeks to deliver sustainable transport objectives through positive action and is articulated in a document that is regularly reviewed.” (DfT/DCLG, 2009)

Travel plans are unique and specific to each development site, but guided by a framework of common principles and components. They must identify an individual package of measures that can be applied at that location to ensure accessibility and encourage an increased use of more sustainable modes of travel – walking, cycling, motorcycling, public transport and car sharing. A robust travel plan will reduce the amount of car traffic generated by a development, reducing the pressure on the surrounding road network and, in some cases, enabling increased development at reduced cost.

“Travel plans focus on achieving the lowest practical level of single occupancy vehicle trips to or from a site and widening the use of other travel modes.” (DfT/DCLG, 2009:18)

Why are travel plans required in Somerset?

Travel plans are required in Somerset to support a number of local and national policy objectives aimed at:

- reducing pressure on highway capacity, particularly at peak times - allowing a greater volume of development than would be the case without a travel plan
- reducing the cost of works on the highway or other transport infrastructure
- cutting carbon emissions and their contribution to climate change
- reducing road danger and protecting vulnerable road users
- improving local air quality
- encouraging more active travel, with gains for health
- enabling children to travel independently
- reducing noise pollution
- reducing business and logistics costs including parking and fleet management
- improving staff morale in the targeted organisation
- creating more attractive and liveable neighbourhoods, strengthening the self-containment of local communities
- increasing business profitability and functionality of the development through increased accessibility and reduced congestion
- making development more viable by reducing the amount of upfront expenditure on measures if it can be proven during the operation of the development that sustainable travel patterns can be delivered without additional investment in capacity or alternatives

Planning Policy Guidance (PPG) 3: Housing requires local planning authorities to consider accessibility to “jobs, shops and services by modes other than the car, and the potential for improving such accessibility” when assessing planning applications and “place the needs of people before ease of traffic movement in designing residential developments”. A full list of relevant policies is provided in Table 1.1.

PPG 13: Transport states that, “The Government considers that travel plans should be submitted alongside planning applications which are likely to have significant transport implications, including those for:

- all major developments comprising jobs, shopping, leisure and services...

- smaller developments... which would generate significant amounts of traffic in, or near to, air quality management areas, and in other locations where there are local initiatives or targets set out in the development or local transport plan for the reduction of road traffic or the promotion of public transport, walking or cycling ...
- new and expanded school facilities...
- where a travel plan would help to address a particular local traffic problem associated with a planning application, which might otherwise have to be refused on local traffic grounds.”

Government planning policy is currently under review. The draft National Planning Policy Framework (DCLG, 2011, p22) states,

“A key tool to facilitate this [reductions in greenhouse gas emissions and congestion] will be a Travel Plan. All developments which generate significant amounts of movement, as determined by local criteria, should be required to provide a Travel Plan.”

Areas where travel plans may be particularly important to implement include Growth Point areas and other major areas of development focus. Development in Somerset over the next decades will be extensive with new housing and employment land being developed in the county. Research conducted for the second Local Transport Plan (LTP) forecasted an increase in peak-time traffic delays in urban areas of between 130% and 220%. To accommodate the forthcoming housing growth and ensure access to key services for all without putting intolerable strain on the local travel network, travel impacts from new developments must be carefully managed. DfT (2007, and DfT/DCLG, 2009) is supportive of the role of travel plans in reducing the need for expensive highways infrastructure to accommodate unrestrained vehicle movements to and from new developments.

Thresholds for travel plans are provided in Table 1.2.

Type of policy	Title of documents and references
Acts and Circulars	<ul style="list-style-type: none"> • Planning and Compulsory Purchase Act 2004 • Local Democracy, Economic Development and Construction Act (forthcoming) • Circular 5/05 Planning Obligations 2005 • Circular 2/07 Planning and the Strategic Road Network 2007 • Circular 11/95 The Use of Conditions in Planning Permissions (Section 2/Appendix A) 1995 • Circular 04/08 Planning Related Fees • Education and Inspections Act 2006 • Climate Change Act 2008 • Environment Act 1995 • General Permitted Development Order • Town and Country Planning Act 1990

Type of policy	Title of documents and references
	<ul style="list-style-type: none"> Local Government Act 2003 Section 93 Highways Act 1980
Planning Policy Statement/Guidance	<ul style="list-style-type: none"> Draft National Planning Policy Framework 2011 PPS1: Delivering Sustainable Development 2005 Supplement to PPS1: Planning and Climate Change 2007 PPS3: Housing 2006 PPS12: Local Spatial Planning 2008 PPG13: Transport 2001 (updated 2011) Planning Obligations: Practice Guidance 2006
Local Development Plans including Local Development Framework Core Strategies	<ul style="list-style-type: none"> RPG10: Regional Planning Guidance for the South West – Policy TRAN 10 Walking, Cycling and Public Transport Somerset and ExmoorNational Park Joint Structure Plan Review – Saved Policies 39-40 and 42-49 Taunton Deane Published Plan Core Strategy 2011-2028 (Consultation version) – Policy CP 6(Transport and Accessibility) and Taunton Town Centre Area Action Plan – Policy Tr 4(Travel Plans) (adopted October 2008) Sedgemoor Core Strategy (Proposed Submission incorporating the Council's recommended changes) – Policy D 10(Managing the Transport Impacts of Development) Mendip Core Strategy (Draft for Consultation, Preferred Options Stage) – Development Policy DP3(Transport Impacts of New Development) West Somerset – currently only at options stage (ref. 6.2 Transport) South Somerset Draft Core Strategy (incorporating Preferred Options) – Policy YV4(Modal Shift for Yeovil), CY4(Modal Shift for Chard), TA1(Low Carbon Travel), TA2(Travel Plans) ExmoorNational Park– currently only at research stage

Type of policy	Title of documents and references
Local Obligations Protocols ⁽³⁾	<ul style="list-style-type: none"> • Taunton Deane Planning Obligations Supplementary Planning Document (Adopted December 2008) Para. 6.42 • West Somerset Planning Obligations Supplementary Planning Document (Adopted December 2009) Para. 3.6-3.12
Somerset Transport Plans	<ul style="list-style-type: none"> • Somerset Future Transport Plan 2011 – 2026 (Published February 2011)⁽⁴⁾⁽⁵⁾ • Somerset Future Transport Plan Policy Document – Schedule of Policies (March 2011) <ul style="list-style-type: none"> • Policy SUS 2(<i>Bus and Community Transport Services</i>) (supported by ECN 2) • Policy SUS 3(<i>Smarter Choices</i>)^(see footnote XX) • Policy SUS 4(<i>Cycling</i>)⁽⁶⁾ • Policy ECN 2(<i>Sustainable Development</i>)⁽⁷⁾ • Policy ECN 3(<i>Parking</i>)⁽⁸⁾ • Policy ECN 4(<i>Information & Communication Technology</i>)⁽⁹⁾

3 See also para 3.24 of SCC Transport and Development Policies, “In many cases planning obligations will be required so that provision is made for any necessary improvements to services and facilities and to deliver community infrastructure needed by the inhabitants, occupiers or other users of the development. In many instances, this may amount to contributions towards softer measures, through marketing of travel information, provision of travel vouchers or delivering travel plan initiatives.”

4 “We will help people make smarter travel choices. We will provide high quality transport information and encourage organisations to develop ‘Travel Plans’. Travel Plans are written by businesses, schools and even for individual households. They help people meet their everyday needs in a way that keeps our roads working and protects Somerset’s people and places.” p4

5 The Strategic Environmental Assessment (SEA) is available from www.somerset.gov.uk

6 “We will encourage people to cycle more by helping them to make smarter travel choices and get better cycling skills. We will support the provision of appropriate and well connected cycling facilities.”

7 “We will work with developers to ensure they take into account the way people travel, and how people travel, to access services.”

8 “We will help improve parking facilities to encourage more sustainable means of travel. We will work to improve the management of parking and help plan new developments appropriately”

9 “We will promote the use of ICT to reduce the need to travel and increase people’s ability to access goods and services.”

Type of policy	Title of documents and references
	<ul style="list-style-type: none"> • Policy ECN 5(Freight)⁽¹⁰⁾ • Policy EDU 1(School Travel)⁽¹¹⁾ • Supported by paras. 3.34 (general approach to smarter choices); 4.23-26⁽¹²⁾ (adoption of this Guidance); 4.30 (enacting ECN 2); 4.49 (video conferencing and flexible working); 4.68 (enacting ECN 4) • Somerset Future Transport Plan Policy Document – Transport and Development (March 2011) • Para. 3.4 (use of Guidance to prepare TPs)⁽¹³⁾
Local community plans	Some areas have specific initiatives to engage employers in travel plans through Local Strategic Partnerships, such as South Somerset Together in Yeovil
Government guidance/guidelines	<ul style="list-style-type: none"> • Guidance on Transport Assessment 2007 • Delivering Travel Plans through the Planning Process 2009 • Essential Guide to Travel Planning 2008 • Manual for Streets 2007 and Manual for Streets 2 2010 • Making Residential Travel Plans Work 2007
Somerset County Council guidance/guidelines	<ul style="list-style-type: none"> • Manual for Travel Plans 2008 • Estates Roads in Somerset 1991 • Highways Development Control in Somerset

Table 1.1

1.2 Relevant Local Policy

Targets for the reduction of road traffic by the LHA

- 10 “We will help hauliers choose the most appropriate routes and work to improve communication between communities and the hauliers that serve them.”
- 11 “We will help people walk and cycle to Somerset’s schools and make the school transport services we provide more efficient.”
- 12 “We are developing a Supplementary Planning Document (SPD) to support the delivery of Travel Plans in Somerset”
- 13 “Developers will be expected to use our Travel Plans SPD(7), as outlined in our ‘Schedule of Policies’, to prepare their Travel Plans.”

The second Local Transport Plan Modal Share of Journeys to Work (LPI2) indicator aimed to reduce single occupancy vehicle (SOV) use from 54% for all journeys to work to 50% by 2011. Travel plans are expected to contribute significantly towards maintaining this target.

Local initiatives for the promotion of public transport, walking and cycling by the LHA

Moving Somerset Forward is an ongoing Somerset County Council campaign initiative to reduce congestion and pollution in Somerset by helping developers, businesses, local communities and members of the public to explore sustainable transport options. It provides detailed information on all forms of transport in Somerset and beyond. It is accompanied by a website and works in partnership with other providers such as the NHS to secure funding for services relating to sustainable transport, such as cycle repair sessions and promotion.

Further guidance on the Moving Forward campaign is available on Somerset County Council's website www.movingsomersetforward.co.uk.

Local targets for the adoption of travel plans by local businesses and other organisations

Somerset County Council's Strategic Planning Group, through its service plan (2010-11), aims to begin at least 24 new travel plans and to agree and approve at least 6 new travel plans annually. Performance against this target is reviewed each year and the target will be stretched where necessary to ensure continued securing and implementation of travel plans.

Air quality areas in Somerset

Three Air Quality Management Areas (AQMA) exist in Somerset. Two of these are in Taunton (section of East Reach and the A358 at Henlade). Yeovil has been declared a town-wide AQMA.

Although no AQMAs have been introduced in Bridgwater to date, certain congested routes through the town (Taunton Road, Broadway and Monmouth Street) experience high concentrations of NO₂ relative to the national maximum threshold. These roads are being closely monitored.

Air Quality Action Plans (AQAPs) are in place to address the problems in the AQMAs named above, which include actions relating to the role of travel plans.

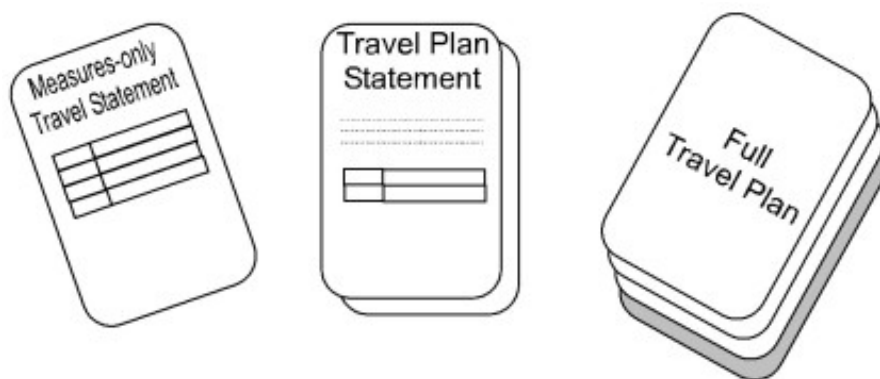
1.3 When are Travel Plans required in Somerset?

PPG13 (2001) sets out indicative thresholds above which it is indicated travel plans should be submitted alongside planning applications for all major developments comprising jobs, shopping, leisure and services with further categories of land-use

added in the Guidance on Transport Assessment⁽¹⁴⁾ (GTA) (2007). Somerset has adopted its own local standards to clarify what type of travel plan is required and when.

Thresholds for Travel Plans in Somerset

In Somerset, **Travel Plans (TP)**, **Travel Plan Statements (TPS)**, or **Measures-only Travel Statements (MoTS)** are required relative to the size of the development. The land-use size thresholds vary between land-uses allowing for differences in employment densities and trip generation between land uses. A Full Travel Plan will deliver a greater level of modal shift than a lower level travel plan.



TVS 1

Table 1.2 presents the thresholds that apply in requiring travel plans in Somerset, as a result of the adoption of this guidance, and compares these to national indicative thresholds.

As a basic threshold by which to negotiate and determine a requirement for a Full Travel Plan document, a development site with 50 or more total employees, 25 car parking spaces or 1000m² floor areas could be required to produce a travel plan as a general principle, which all occupiers will be expected to take part in delivering.

The requirements for producing a travel plan document are less extensive for smaller developments with fewer impacts (see Table 1.2), and the content of the travel plan varies according to the surrounding local context or position in the settlement hierarchy.

The content of travel plans is further described in Table 1.2. Before submitting a planning application (see Section 2.1), developers should check Table 1.2. The local planning authority or local highway authority will use these guidelines to advise whether a travel plan is needed and in validating planning applications.

14 “These thresholds are for guidance purposes and should not be read as absolutes. Local authorities may interpret them in light of their own circumstances.” (Guidance on Transport Assessment)

Travel plans in specific circumstances

Travel plans for developments with existing or historic trip generation:

- Even if a Transport Assessment has indicated that either the road network in the immediate vicinity is able to carry the additional car trips arising from a development or that the car trips are equal to or less than an existing land-use on the development site, an appropriate travel plan may still be required in order to maximise the use of more sustainable modes of transport particularly on the wider network in accordance with delivering the outcomes outlined in Section 1.1.

Travel plans for developments outside of policy limits:

- Exception development sites outside of development limits meeting travel plan thresholds will require particularly extensive travel plans if granted planning permission to ensure that sustainable travel objectives are met.

Adopting travel plans for developments below indicative national thresholds:

- In addition to the indicative thresholds, PPG13 allows travel plans to be required below these thresholds where there are local initiatives and targets to reduce car use and support the use of alternative modes of travel and/or where local conditions demand (see Section 1.1)

Adopting travel plans for equality of access:

- For developments where equality of access is important, such as GP surgeries/medical centres, there is a general requirement to produce a travel plan to ensure accessibility.

Travel plans for town centre development sites:

Town centre development sites with good accessibility levels will be expected to introduce measures according to the type of travel plan required by the thresholds to ensure that modal shift is maximised for developments with good levels of accessibility across Somerset.

Travel plans for mixed use developments:

For mixed-use developments, umbrella travel plans are required to cover the entire development site including all individual uses in the development (however small) in as much detail as possible.

Travel plans for outline applications:

Travel plans will be required for assessment at the outline application stage. For the limited number of measures that cannot be detailed at the time the travel plan is submitted, travel plans should include an introduction the measures that will be submitted in more detail at a later stage, and outline the key criteria that will be followed in their design (e.g. standards, templates, ratios of provision etc.).

Land use type	Somerset County Council lower size threshold (m ² GFA unless indicated)	Level of Fee	Structure required of travel plan document at this scale of development	Measures expected in travel plan document
		○ = no fee ◆ = lower level □ = upper level	Site Audit Report with Polar Plot, Action Plan, and Monitoring Strategy and Modal Share Targets required in all submissions <u>except</u> where indicated below See Contents Checklist for a template of travel plan headings	As a minimum See Table 3.1 for definitions of some of these measures
a. Measures-only Travel Statements (MoTS)				
A1 – food or non-food				✓ Travel Plan Representative ✓ Details of parking levels and locations for all modes of travel and users of the development
A2 – financial and professional				✓ Website and paper based measures for alternative travel directions (£) or © ✓ Training and induction/sales plans for staff/visitors/ residents © ✓ Financial incentives (including analysis of payments for car use)
A3 – restaurants and cafes	>100	○		✓ Residential Travel Vouchers for residential households with travel plans ✓ On-site facilities for greener travel © - Showers - Lockers - Cloakroom - Drying cupboards/cabinets - Benches - Walking/cycling provision
A4 – drinking establishments				✓ Residential travel plan measures (see Site Audit and Design Guidelines) © ✓ Smarter working measures (IT, home working) © ✓ Parking Management Strategy ©, e.g. restriction of parking for car users - permits - charges
A5 – hot food takeaways				✓ Controlled Parking Zones and TROs (£) ✓ References to local policy documents (see Table 1), www.movingforward.co.uk and www.carsharesomerset.com © ✓ Engagement with local employers/area-wide travel plan initiatives/activities/networks ©
C2 – hostels, education residential				
B1 – offices			= Site Audit Report with Polar Plot and Monitoring Strategy and Modal Share Targets not required.	
D1 – health centres/public buildings	>500	○	✓ Action Plan required as Table of Measures (see Appendix 9 for template)	
D2 – assembly and leisure				
B2-7 – general industry	>1000	○		
B8 – storage or distribution				
C2 – education residential	>50 students			
C2 – hostels	>100 residents			
C1 – hotels	>30 bedrooms (C1) or beds (C2)	○		
C2 – hospitals and nursing homes				
C3	>10 dwellings	○		Appendix: - Signed copy of travel plan charter included with travel plan - Draft travel information - Relevant plans and drawings showing location and detail of hard travel plan measures

Land use type	Somerset County Council lower size threshold (m ² GFA unless indicated)	Comparative GTA thresholds for selected development classes (m ² GFA unless indicated) Note: DfT only sets indicative thresholds for travel plans and does not prescribe the type of travel plan this relates to	Level of Fee ○ = no fee ◆ = lower level ◻ = upper level	Structure required of travel plan document at this scale of development Site Audit Report with Polar Plot, Action Plan, and Monitoring Strategy and Modal Share Targets required in all submissions except where indicated below See Appendix Contents Checklist for a template of travel plan headings	Measures expected in travel plan document As a minimum See Table 3.1 for definitions of some of these measures
b. Travel Plan Statements (TPS)					
A1 – food	>500	TS >250 TS >800	◆	✓ Site Audit Report with Polar Plot only required for residential developments	As above plus: ✓ Travel Plan Coordinator (half day per week) with contact details. ✓ Organisational, management responsibilities and reporting lines allocated ☺ ✓ Programme of ongoing awareness raising campaigns, promotions, events ☺ ✓ Automatic traffic counters for employment developments (£) or ☺ ✓ A defined budget or travel plan management fund (£) or ☺
A1 – non-food					
A2 – financial and professional					
A3 – restaurants and cafes					
A4 – drinking establishments					
A5 – hot food takeaways					
B1	>1000*	TS >1500 (B1)	◆	✓ Action Plan required for on-site measures to be supplemented with a Table(s) of Measures for each relevant unit or phase at reserved matters stage and post-occupation to demonstrate compliance with TPS	
D1 – health centres/public buildings				✓ Monitoring Strategy and Modal Share Targets <u>only</u> required for employment developments with a completed modal share targets table(s) attached to travel plan	
D2 – assembly and leisure					
B2-7	>1500	TS >2500	◆		
B8	>2000	TS >3000	◆		
C1 – hotels	>75 bedrooms	-	◆		
C2 – education residential	>100 students	-	◆		
C2 – hospitals and nursing homes	>40 beds	-	◆		
C2 – hostels	>250 residents	-	◆		

	Somerset County Council lower size threshold	Comparative GTA thresholds for selected development classes	Level of Fee	Structure required of travel plan document at this scale of development	Measures expected in travel plan document
C3	>30 dwellings (or where car parking allocation is fewer than 1 space per dwelling for any dwelling in the development)	TS >50 units	◆		

Land use type	Somerset County Council lower size threshold	Comparative GTA thresholds for selected development classes	Level of Fee	Structure required of travel plan document at this scale of development	Measures expected in travel plan document
	(m ² GFA unless indicated) with indicative staff numbers for reference#	(m ² GFA unless indicated) Note: DFT only sets indicative thresholds for travel plans and does not prescribe the type of travel plan this relates to	○ = no fee ◆ = lower level □ = upper level	Site Audit Report with Polar Plot, Action Plan, and Monitoring Strategy and Modal Share Targets required in all submissions except where indicated below See Appendix Contents Checklist for a template of travel plan headings	As a minimum See Table 3.1 for definitions of some of these measures
C. Full Travel Plans					
A1 – food	>800 (42 indicative staff number)	TA/TP >800	□	✓ Action Plan to be supplemented with a Table(s) of Measures for each relevant unit or phase at reserved matters stage and post-occupation to	As above plus: ✓ Travel Plan Coordinator (1 – 5 days per week – see Table 5 for guidance) with contact details, organisational, management responsibilities and reporting lines allocated @ ✓ Physical off-site measures to enable walking, cycling, public transport (£)
A1 – non-food	>1500 (75 indicative staff number)	TA/TP >1500	□		

	Somerset County Council lower size threshold	Comparative GTA thresholds for selected development classes	Level of Fee	Structure required of travel plan document at this scale of development	Measures expected in travel plan document
A2 – financial and professional A3 – restaurants and cafes A4 – drinking establishments A5 – hot food takeaways	>1000*	-	☐	demonstrate compliance with TP ✓ Monitoring Strategy and Modal Share Targets with a completed modal share targets table(s) attached to travel plan	linked to Site Audit Report ✓ Policies to manage deliveries ☐ ✓ Signage strategy on-and off-site included on plans for directions and facilities (£) or ☐ ✓ Communications Strategy including Green travel clubs and proposals for target audience segmentation ☐ ✓ Engagement in and/or setting up of area-wide travel planning proposals (£) or ☐ ✓ Automatic traffic counters (permanent) (£) or ☐
B1	>1500 (94 indicative staff number)	TA/TP >2500	☐		
B2-7	>2500	TA/TP >4000	☐		
B8	>5000 (100 indicative staff number)	TA/TP >5000	☐		
C1	>100 bedrooms	-	☐		
C2 – education residential	>150 students	-	☐		
C2 – hostels	>400 residents	-	☐		
C2 – hospitals and nursing homes	>50 beds				
C3	>50 units	TA/TP >80 units	☐		

Notes

(£) - direct financial payment or commitment to LHA or other parties, e.g. occupiers, required; ☐ - commitment to implement required; * - Not fixed, but this threshold serves as a starting point by which to determine type of travel plan required

Table 1.2 Travel plan thresholds for development sites in Somerset based on strategic significance and comparison with indicative thresholds from the Government's Guidance on Transport Assessment (2007).

Extensions or alterations to existing land-uses:

Opportunities will be sought during the development, alteration or extension of existing sites to secure travel plans or travel plan measures where these do not already exist, in order to “promote the widespread use of travel plans amongst businesses, schools, hospitals and other organisations” (PPG13).

Developments sites that are being extended by 20% or more in GFA (or other relevant measure), bringing the total GFA/relevant measure above the travel plan thresholds or where 25 car parking spaces or more are being added will be required to prepare and have approved a travel plan. This travel plan should cover for the entire site across which the business operates; this is defined below.

Travel plans may also be advantageous for changes in occupier or land-use involving a significant (non-trivial) planning application also trigger a travel plan where a new management structure and staff are being introduced and a new set of travel patterns are likely; this is particularly relevant where the previous incumbents did not have a travel plan.

Criteria for defining the limits of a site:

In defining a travel plan need for an extension, total parking levels for a development are calculated taking into account the entire operational site including the extension, i.e. analyses is not limited to the extension. Any travel plan for an extension is similarly be required for the whole site (i.e. the ‘blue line’ rather than solely the ‘red line’ of the application). The operational site is defined by any of the following:

- Shared car parking
- Shared business ownership or operational activities
- Shared facilities
- Shared access
- Shared marketing

Section 2 goes on to explain who is involved in travel planning, and Sections 3 and 4 describe the required content of travel plans.

2 Delivering a Travel Plan through the Planning Process

2.1 The role of Local Authorities in Somerset

This section sets out the respective responsibilities and roles of different authorities in Somerset.

Local government in Somerset follows a two-tier structure, with planning responsibilities largely lying with District Councils (LPAs) and highways and transport responsibilities with the County Council (Local Highways Authority, or LHA).

Aside from national scale infrastructure projects, Planning Applications must be submitted through the LPAs; in Somerset these are:

- Exmoor National Park Authority
- Mendip District Council
- Sedgemoor District Council
- South Somerset District Council
- Taunton Deane Borough Council
- West Somerset District Council
- Somerset County Council (only for County matters such as schools, major road schemes, Park and Ride sites, and minerals and waste applications)

Consulting with Somerset County Council on planning applications

Somerset County Council, acting as as the Local Highways Authority (LHA), is a statutory consultee⁽¹⁵⁾ on all planning applications with highway considerations, including taking responsibility for access and travel planning matters. The LPA liaises with the LHA's Highways Development Control (HDC) team, who assess the impact of the proposed development on the highway network and feed this information back to the LPA.

As part of the LHA's highways role, Somerset County Council assesses and coordinates the implementation of travel plans prepared as part of planning applications, on behalf of LPAs. This coordinating function is fulfilled by the LHA's Travel Plan Co-ordinator (SCC TPC). The LPA, after considering advice and representations from all parties, determines planning applications, which includes deciding whether to secure the travel plan and its elements in any legal agreement (see section 5 on securing travel plans) or by setting travel plan conditions.

15 The LHA's Highways Development Control function is provided for under the General Development Planning Order which requires local planning authorities to consult the LHA, as the highway authority, as a statutory consultee on all planning applications with 'highway considerations'.

An outline of the respective roles of the LPA, HDC team and SCC TPC is provided in Table 2.1 (current at November 2011). An ideal process to be followed by all parties is given in Figure 2.1. Developments below the thresholds set out in Table 1.2 may contain measures to encourage sustainable travel, but will not usually have the direct involvement of the SCC TPC.

LPA	HDC	SCC TPC	Developer and occupiers	Others
Project manage application	Agree physical infrastructure measures with developer	Provide advice to HDC, developer and LPAs on packaging physical infrastructure measures with smarter choice measures into an integrated travel strategy	Prepare travel plan	Transport Assessment Analysts
Decide on planning permissions	Provide formal detailed advice to LPA on all highway and transport aspects of the application	Review and recommend the approval of the travel plan	Implement travel plan	Estates Roads Designers
Discharge conditions related to the travel plan	Recommend enforcement action in the event of breach of obligations	Receive and review monitoring reports concerned with the travel plan (over min. 5 year period)	Appoint a travel planner	Landscape Officers
Adopt SPD for travel plans		Advise LPA on the discharging of conditions or any breaches in planning obligations	Market travel plan	Legal Services
Develop policies in Local Development Frameworks for travel plans			Monitor and report progress on travel plan	Highways Agency
			Maintain long-term arrangements for travel plan	Safety and Technical Audit teams
				Police/ architectural liaison officers
				Code Assessors
				Public Rights of Way officers
				Heritage and landscape officers

		Develop guidance on travel plans for LPAs to adopt as SPD		Environment Agency
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Table 2.1 Role of local authorities and other parties in the preparation and implementation of travel plans associated with planning applications

Consulting with the Highways Agency on planning applications

If the development is likely to have an impact on the Strategic Road Network (or SRN, i.e. motorways and trunk roads⁽¹⁶⁾), the Highways Agency (HA) is also consulted on the planning application and associated travel plan. The HA has the power to direct consideration of the planning application and impose conditions which the LPA and LHA must accept if planning permission is granted (further information on the role of the HA is given below).

16 The Trunk Road Network, is a system of strategic routes of national importance that caters for the through movement of long distance traffic. The network includes motorways ("M") and all-purpose ("A") roads managed by the Highways Agency (M5, A36, A303). The Trunk Road Network does not include A roads managed by Somerset County Council.

The LHA works together with the HA to provide comments on developments with travel plans. Further explanations of the HA's specific requirements are provided as follows.

Planning Policy:

The Highways Agency (HA) has a clear policy to promote travel plans as an integral part of managing the capacity of the trunk road network (Circular 02/2007). As an alternative to building additional highway infrastructure to accommodate traffic growth, the HA is instead seeking to reduce demand from developments (and their surrounding areas) with a combination of measures to promote sustainable access to sites. They will only allow developments which do not adversely affect trunk road traffic flows and look at these effects 10 years after. The Agency's approach to promoting Travel Plans supports the Department of Transport's (DfT) overall environment and climate change objectives.

For developments that could significantly impact on the trunk road network, representatives of the Highways Agency should be consulted throughout the process from the earliest stage. The current Highways Agency policy is to manage further traffic growth on its highway network by exploiting fully the opportunities provided by travel plans.

The Highways Agency would expect a travel plan to be submitted with a planning application and include:

- the identification of targets based on transport assessment
- the methods to be employed to meet these targets
- detailed travel plan management arrangements including identification of travel plan co-ordinator
- the mechanisms for monitoring and review, taking into account phasing of the development
- the mechanisms for reporting
- the remedial actions in the event that targets are not met
- the mechanisms for mitigation
- implementation of the Travel Plan to an agreed timescale or timetable and its operation thereafter, including actions on how it is to be managed
- where appropriate, financial provision for implementation and remedial measures

The Highways Agency's approach to travel plans is focused on outcomes. All plans are tested against their ability to deliver no deterioration in traffic conditions on the trunk road network 10 years after the application is approved. This approach is set out in Circular Roads 2/2007.

It is essential that travel plans are rigorously monitored in order that an understanding of the effectiveness of the plan can be gained. This is useful to understand what changes have occurred over the period and also informs the LHA and Highways Agency to understand whether travel plan obligations or conditions are being met.

The acceptability of the Travel Plan will need to be agreed in writing by the Local Planning Authority and Local Highway Authority (in consultation with the HA on behalf of the Secretary of State for Transport), in advance of commencement or occupation of the development.

2.2 Preparation of Travel Plans

Pre-application discussions

Once the need for a travel plan has been established, developers should contact the LHA's HDC team and SCC TPC (and the HA, where applicable) in advance of submitting the planning application to discuss the requirements of the travel plan (see Table 2 and section 3).

For Measures-only Travel Statements (MoTSs), a face-to-face meeting may not be required, but for larger applications (above the Full Travel Plan thresholds), an initial discussion should be seen as essential to agree the scope of the travel plan. This should be done alongside the scoping of the Transport Assessment (TA) and other highways matters.

Matters to be discussed at the pre-application stage:

- work to be done in advance of travel plan submission (for example, site audits and traffic counts for all modes of travel)
- the content of the travel plan, i.e. types of measures to be included in the travel plan
- outcomes sought
- draft terms for any legal agreement
- the mechanism to be used to secure the adoption and implementation of the travel plan

Developers need to be familiar with travel plan requirements in Somerset prior to embarking on the preparation of their travel plan. This particularly applies to the design and inclusion of physical measures (see Section 4).

Pre-application discussions allow time between the submission and determination of the planning permission to formally agree the travel plan document and Heads of Terms. Contacting the HA in advance could minimise the need for it to use its powers of direction later on in the process.

TVS 2

For relevant developments requiring a travel plan, the document should be submitted with the planning application and have been informed by pre-application discussions and technical feedback from the Local Highway Authority (LHA). Travel plans must show integration with the transport assessment, design and access statement, environmental statement and the proposed layout of the development.

Registering travel plans

Developers are required to submit details of their travel plan upfront and developers must register new developments on www.iontravel.co.uk when requested by the LHA. LHA approval is only given to travel plans following agreement of the travel plan document, and the entering of actions and targets onto iOnTRAVEL. iOnTRAVEL is the LHA's online travel plan submission and monitoring system to record the ongoing operation of their travel plan over several years (see section 6). Throughout the development of the travel plan, the LHA TPC will provide feedback and advice to the developer to enable the plan to be operated effectively – see section 2.3 below.

TVS 3

Once travel plans are agreed and prior to their full approval by the LHA, applicants must enter the details of their travel plan onto iOnTRAVEL to enable the ongoing management and supervision of travel plans by the LHA.

TVS 4

To enable the LHA to monitor the progress of Full Travel Plans or Travel Plan Statements over the life of the development, applicants are required to pay a Travel Plan Fee where an appropriate legal agreement is being used to secure highways and/or travel plan measures according to a published schedule negotiated as part of the development process once planning permission has been granted.

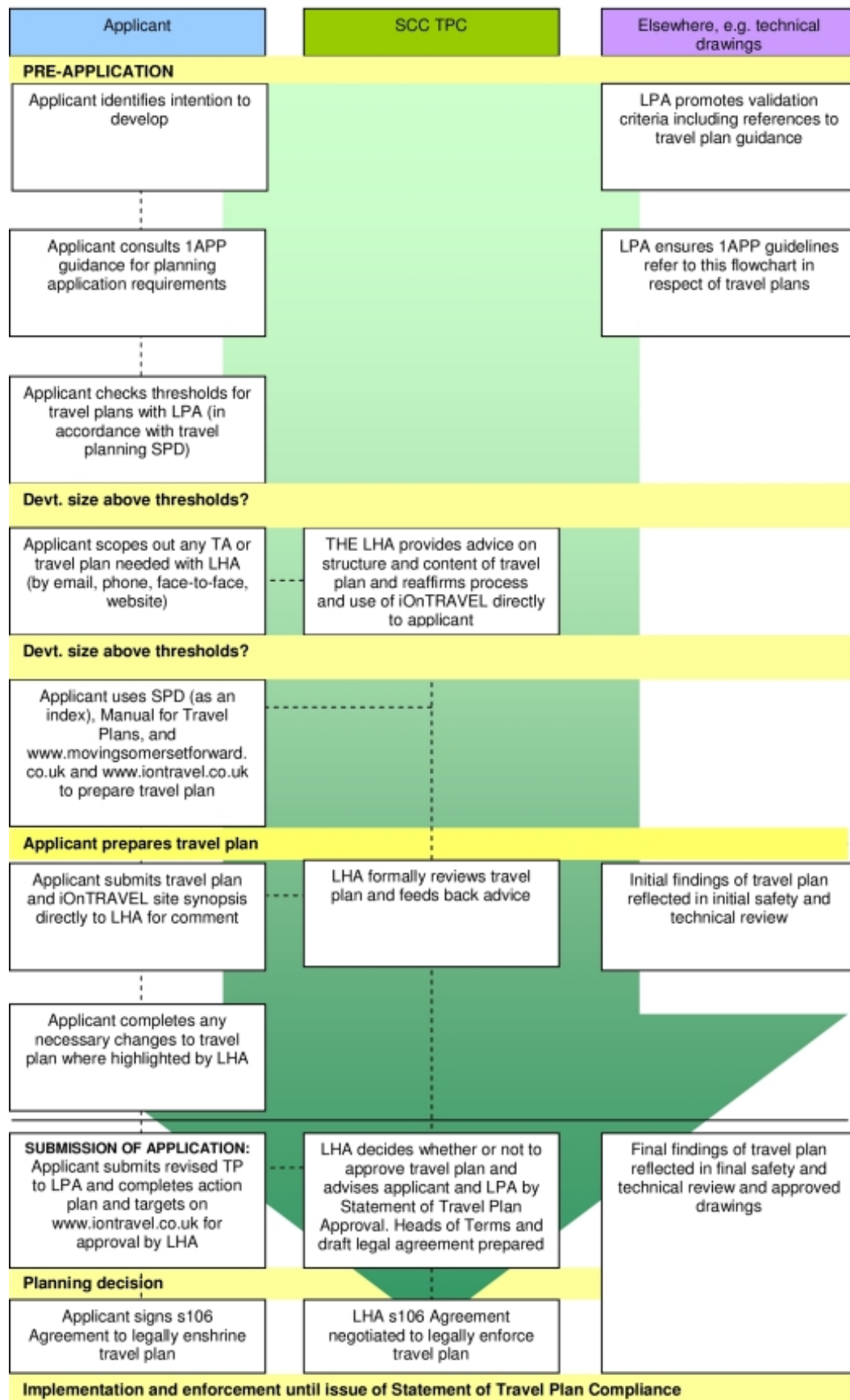


Figure 2.1 Summary of the process of preparation of a travel plan

2.3 Gaining approval of Travel Plans as part of the planning application

The SCC TPC assesses travel plans against guidance detailed in Somerset County Council's advice⁽¹⁷⁾, in the context of the site location and local transport conditions, with the ultimate aim of achieving the lowest practicable level of car use.

It is not acceptable to defer the agreement of the main components of the travel plan past the timescales and stages set out in Figure 2.1 as they must be included in legal agreements and site drawings.

TVS 5

Full travel plans must demonstrably cover three topic areas:

1. A Site Audit Report giving information about the existing range of travel opportunities to and through a development site by all modes of travel
2. An Action Plan of new initiatives to improve travel options for staff, customers and visitors
3. A Monitoring Strategy providing a methodology and schedule for monitoring travel to and from a development site by all modes of travel including sets of approved modal share targets

If the travel plan has not reached a sufficient standard by the end of the formal consultation period on the planning application, the HDC team may recommend refusal of the application to the LPA. It is ultimately a matter for the LPA to decide whether the principle of development outweighs transport policies that seek to reduce reliance on the private car and ensure equality of access by alternative modes of transport. PPG13 states that,

“The weight to be given to a travel plan in a planning decision will be influenced by the extent to which it materially affects the acceptability of the development proposed.”

Conversely, if the travel plan is sufficiently robust, the LHA may consider that the traffic mitigation measures proposed in the travel plan allow development to go forward that might otherwise be rejected on highways grounds. In these cases, the HDC team may consider not objecting to the LPA regarding the planning application.

17 Including Manual for Travel Plans, available via www.movingsomersetforward.co.uk/new-developments. Both this guidance and Manual for Travel Plans (MfTPs) have been informed by Government guidance on travel planning and best practice elsewhere in the country (see Acknowledgements and References).

Refusing an application

Should an application be refused on the basis of a travel plan, developers have the right to appeal against a refusal through a written representation, informal hearing or public enquiry.

Reasons for refusal on the basis of a travel plan might include but are not limited to:

- Travel plan not complying to the definition and content (including scope, timing and detail of measures) of a travel plan as specified by this formal guidance and providing insufficient detail to make a full assessment of the traffic impacts of the proposal
- Oversupply of car parking spaces against modal share targets or Countywide Parking Standards
- Lack of accessibility by alternative forms of transport – walking, cycling, or public transport
- Lack of potential for modal shift and lack of scope for an effective travel plan given the size of the development, fostering growth in the need to travel contrary to advice given in PPG13 or any subsequent policy framework
- Content of travel plan otherwise insufficient to deliver outcomes to address adverse highway impacts

Relevant policy documents are listed in Table 1.1.

2.4 Travel Plan Fees

The LHA requires applicants/developers to commit to a long-term management framework and monitoring strategy for their travel plans in order to achieve sustainable and lasting results. A successful travel plan must be a long-term management strategy that is constantly monitored, updated and its performance reviewed. This is a unique selling point of travel plans.

“The plan continues for the life of the development and requires commitment from occupiers and partners. It is not simply a means of securing planning permission.” (DfT/DCLG, 2009)

To enable the ongoing auditing and supervision of operational travel plans, a standard set of fees are applied to travel plans secured through the planning process. Fees are payable to the LHA through legal agreement and cover non-statutory (discretionary) services provided⁽¹⁸⁾. The current level of fee is available from a published schedule at www.movingsomersetforward.co.uk.

18 Further information on local authorities' ability to use fees is available in guidance, with p113 of the DfT/DCLG's recent guidelines on Delivering Travel Plans through the Planning Process being a good starting point. Section 93 Local Government Act 2003 gives the power to for local authorities to charge for discretionary services. Section 93 of the Local Government Act 2003 provides the power to charge for discretionary services. These are services that an authority has the power, but not a duty, to provide.

The Travel Plan Fee is required to be paid following the granting of planning permission for outline, hybrid, and full and reserved matters applications. The Travel Plan Fee is linked to the size of development, and applied at two levels, with the threshold between the upper and lower fee determined by the Department for Transport's (DfT) travel plan thresholds published in the Guidance on Transport Assessment (2007). Table 2 gives an index of fees by size of development.

In the event of any dispute over payment of the fee, the LHA would be unable to supervise and assess the long-term viability and impact of the travel plan, and would need to call into question the applicant's commitment to its future operation. This could inform the LHA's views in judging the acceptability of the development and the likelihood of the Travel Plan delivering the outcomes necessary to address the highway impact. Further information about monitoring travel plans is provided in Section 6.

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.

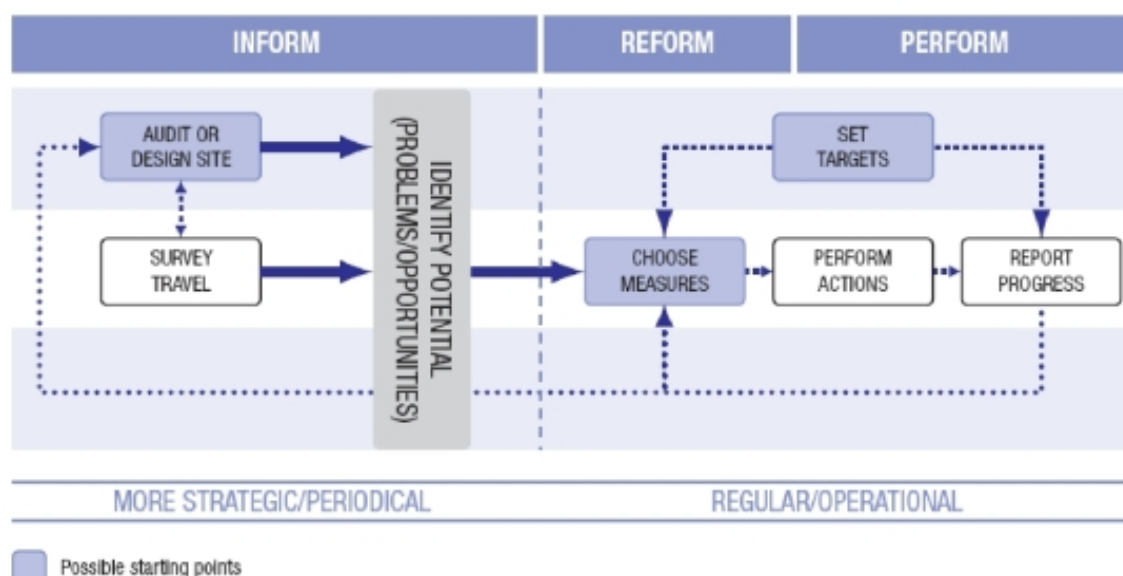


Figure 3.1 Plan preparation and implementation flow chart (Source: SCC, 2008).

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 alternatives 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.

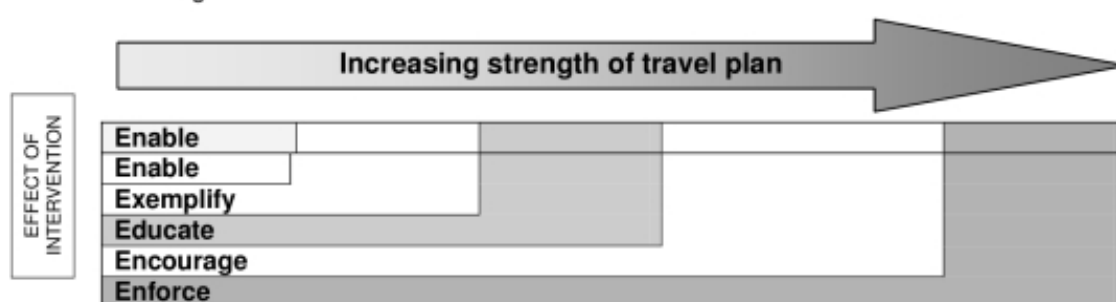


Figure 3.2 The content of the Action Plan. Refer to Table 3.1 for measures relating to these headings.

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>
Smarter Travel Policy Dossier	<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 (500m ² or less)	80 or less	½ day (indicative)
26 to 50 (501-1000m ²)	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.

4 Standards and Specifications of Physical On-site Infrastructure

Travel plans strategies intend to affect how people think about their travel choices; this includes affecting the built (or physical) environment where people live, work and travel. When implanted into new developments, physical design and facilities (and the management of them) form an important behavioural influence.

TVS 9

Technical drawings and documents for full planning applications that are approved with the main body of the planning application must include physical measures from the travel plan. Outline applications must include detailed design principles relating to how these measures will be brought forward at the design stage.

Thinking in advance about the implementation of physical travel plan measures ensures that all architects, planning and transport consultants and agents and planning officers are aware of the design implications of the travel plan. Should physical travel plan measures not be included in approved plans and drawings, further planning permissions may be required (unless they are classed as *de minimis*) which may delay or prevent the construction of the development and be costly to developers.

Some physical measures are specific to developments with travel plans (examples are given below); giving further attention to certain elements, such as walking and cycling links, may be important for developments that require travel plans. Other standard measures may be included in non-travel planned developments to a greater or lesser degree.

Before agreeing to provide physical measures in a travel plan, it should also be made clear how these facilities will be maintained and managed in the long-term. Some principles are set out in the following Section.

4.1 Examples of likely physical Travel Plan measures for new developments

- **Electric vehicle charging points**
- **Travel information kiosks**
- **Travel information noticeboards**
- **Car club parking bays**

In addition, extra focus may be placed on the following:

- Pedestrian and cycle links to and through the development and signage
- Parking facilities for cycles and motorcycles
- Benches and seating/waiting areas
- Bus shelters and information
- Dedicated built facilities (showers, waiting rooms, drying facilities and storage)

In general, developments with travel plans in place will require a greater focus on the role of internal infrastructure and the design of the development. This includes buildings, plots, and facilities, and providing permeability and enabling safe movements through the site layout by alternative modes of transport.

4.2 Responsibilities for maintaining external features

Travel plan measures are grouped together below, categorised according to the LHA's role in their adoption and maintenance.

1) Measures adopted by the LHA

Measures to be adopted by the LHA must be included within technical drawings and approved as part of s106/278 and s38 agreements. This allows the full package of measures to go through the necessary technical and safety audit and formal consultation processes. The LHA will then be responsible for the maintenance and the upkeep of these facilities. If any of these form obstructions, they will also require a licence from the LHA.

Physical measures adopted by the LHA include:

- **Dedicated pedestrian links through the development and across development site boundaries where these adjoin existing highway**
- **Footpaths and cycle ways**
- **On-road traffic calming design, controls and road safety features**
- **Car movement restrictions/zoning/home zoning**
- **Public cycle or motorcycle parking facilities on pavements or other parts of the highway**
- **Bus shelters (sometimes LHA, usually LPA)**
- **Short stay parking lay-bys (e.g. allocated parking for home deliveries, unloading)**
- **Car club parking bays (where not off the highway); these will also require designation through TROs. A designated car club space cannot be allocated to any particular car club user**
- **Pedestrian crossings**
- **Cycle barriers on the highway⁽²⁰⁾**
- **Automatic traffic counting equipment for sites above travel plan thresholds**
- **Estates Roads (including road space within car parks, excluding the parking spaces and markings themselves). Further information and guidance is available from the LHA's Estates Roads Team**

20 Motorcycle barriers should only be introduced after a definite need has been established, because measures that reliably exclude motorcycles invariably exclude some cyclists, including users of tricycles, cycle trailers and handcranked cycles. Wheelchairs and mobility scooters will also be excluded.

Use of commuted sums:

Committed sums will only be used where items on the highway are seen as an addition to basic requirements. Examples include high specification paving or non-standard street furniture. Committed sums cover maintenance for a limited period of time.

Use of Advanced Payments Code:

The LHA may need to secure a bond to bring roads up to adoptable standards, even where roads are not adopted initially through s38, using the Advanced Payments Code. This will be done outside of the travel planning process.

Enforcement of parking:

It is an offence for cars to obstruct adopted footways. Parking restrictions (e.g. yellow lines) can be placed on adopted or unadopted highways; in either case, parking infringements are enforceable by the police and through Civil Parking Enforcement where in operation. Parking restrictions on the highway require a Traffic Regulation Order (TRO).

2) Measures requiring a licence on the highway but not adopted by the highways authority

The following require a licence as an obstruction if placed on the highway:

- **Benches**
- **Bus shelters (possibly)**
- **Bespoke (non-standard) signage of pedestrian/cycle routes or facilities**
- **Exterior travel information noticeboards (when on the highway)**
- **Travel information kiosks**
- **Electric vehicle charging points (when on the highway)**
- **Footway parking measures such as bollards**
- **Public art installations (when on the highway); tends to be only on larger or prestigious developments**
- **Trees**

Developers may be required to find a body to take the licence for items on the highway but not maintained by the highways authority, in order to transfer the responsibility for ongoing provision and maintenance. This body might be: the developer; a housing association; the district council; the town council; parish council; or a private individual or management company. This is carried out under s142 of the Highways Act. In some circumstances, this might require a committed sum to this body.

3) Measures on non-highways land and not adopted by the highways authority

The following measures are the maintenance responsibility of parties other than the LHA. This might include: the developer; a housing association; the district council; the town council; parish council; or a private individual or management company.

- Private parking areas/courts, particularly where allocated to specific users
- Parking facilities/buildings for cycles and motorcycles in commercial and residential developments or public car parks owned by District councils
- Bus shelters
- Bespoke signage at facilities, such as supermarket cycle parking bays or business park index boards
- Car club parking bays (where not on the highway)
- Exterior travel information noticeboards (where not on the highway)
- Electric vehicle charging points (where not on the highway)
- Internal car park design measures, e.g. signing and lining
- Public art installations (where off the highway); tends to be only on larger or prestigious developments
- Trees and planting/shrubbery

In certain circumstances, developers may retain areas (such as the above) within the development under their ownership.

4) Measures requiring no adoption

- Bus routes (where no additional highway infrastructure is required)
- Street name plates. The District council is the street naming authority, and decides where street name plates are to be located and maintains them. Street name plates do not appear on site plans. However, the highways authority does not issue Part 2 Certificates for the completion of on-site works until street name plates are in place.
- Standard cycle route signage. This requires no licensing or planning permission.

4.3 Parking for all modes of travel

Levels of parking in new development are set by Somerset County Council and Local Plans/Local Development Frameworks. The specific role of this guidance in terms of parking is to give specific instructions regarding the quality and specifications of parking facilities; this includes cycle and motorcycle parking and associated facilities, and car parking management including car sharing and low carbon vehicle spaces.

TVS10

Developers must provide a proportion of car parking spaces in employment sites for dedicated uses such as car sharing and low carbon vehicles with electric vehicle charging points to encourage employees to match trips and promote more sustainable travel, in line with targets set in the travel plan.

Levels of parking for all modes of transport will be expected to be commensurate with targets set out in the travel plan. Any development which seeks to provide more parking than the target level of car use will be judged by the LHA as less likely to meet its targets, therefore the level of safeguard used to secure the outcomes from the travel plan will necessarily need to be greater to act as an incentive for doing so.

TVS 11

For employment developments, the supply of parking must be at levels relating to Countywide Parking Standards and managed both to meet targets for car, cycle and motorcycle use in the travel plan and to manage the demand for car travel.

Cycle and motorcycle parking should be part of any design from the outset and not added in at the end in 'SLOAP' (Space Left Over After Planning).

The following users should be considered:

Duration of stay	Length of time	Use examples
Short term	Up to two hours	Visitors to retail, leisure and health facilities
Medium term	Two to five hours	Visitors to leisure facilities, large shopping centres and education establishments
Long term	Over five hours	Staff at employment and education facilities, residents and commuters

Table 4.1 Stay lengths to consider when designing cycle and motorcycle parking.

Providing for bicycles and motorcycles is covered in Sections 4.3.1 and 4.3.2.

TVS 12

All new development, including residential development, must feature dedicated cycle and motorcycle parking approved the LHA in accordance with this guidance in advance of planning approval.

Car Sharing Parking:

- Reserved car parking spaces for car sharers must be provided in commercial developments which have car parking. These spaces must be in a prioritised

position in relation to the main building entrance and in principle must be in a privileged area. The spaces will be signed and lined and have appropriate management measures.

- Car share spaces should be accompanied by a 'guaranteed replacement lift home' facility.

4.3.1 Motorcycle parking specifications and examples

Motorcycle parking must be included within all new developments, according to the specifications set out in the Site Audit and Design Guidelines and Enforce sections of Manual for Travel Plans.

Motorcyclists require secure and convenient places to park at destinations.

Table 4.2 sets out the expected design features of motorcycle parking.

Characteristic	Standards
Location/Design	<p>All developments must include formalised parking on convenient sites in close proximity to centres of attraction such as building entrances (within 10m).</p> <p>Provision must be well-lit, level, well-drained, sheltered and free from debris with a non-slip hard surface that is hard enough to support the weight of a motorcycle resting on its stand.</p> <p>Motorcycle spaces must be protected (e.g. by bollards) from use by other vehicles, deliveries, bins etc.</p>
Signage	<p>Signing from the main routes and on-site must be included to reduce the likelihood of informally parked bikes causing a hazard.</p> <p>Spaces themselves must be clearly marked and signed.</p>
Security	<p>Motorcyclists must be given formal opportunities to park close to their destination in a covered off-street area where they can lock their machine to an immovable object (such as a SoldSecure rail, hoop, retractable ground anchor, or post) and where it can be kept under observation (directly or through CCTV) to minimize the risk of opportunistic or planned theft.</p> <p>For residential developments:</p> <p>It is desirable for a proportion of all properties to provide dedicated locking points within the curtilage of their grounds such as ground-level locking points, to appeal to</p>

Characteristic	Standards
	motorcycle owners. This is particularly important where residents are less likely to be owner-occupiers, therefore less able to make the physical alterations that a homeowner might consider.
Access	Riders require adequate space to manoeuvre and a safe and legitimate means of access .

Table 4.2 Motorcycle parking requirements

Location of motorcycle parking

Table 4.3 sets out where motorcycle parking should be placed for different development types. The highest use of motorcycle parking facilities is observed in long-stay locations including large machines at office-based employment developments. A high usage of motorcycle parking facilities can be observed at railway stations.

Land-use	Standards
Short to medium stay	<p>Motorcyclists require spaces close to the destination with points provided for attaching locks.</p> <p>Lockers for helmets and/or protective clothing could be usefully provided at supermarkets and at larger/mixed retail developments.</p>
Long stay	Security is important and locker and changing facilities are needed inside premises.
Residential	<p>Motorcycle parking within the curtilage of a property:</p> <p>Garages and hard standing:</p> <ul style="list-style-type: none"> usually either in a garage or as hard standing in front of a garage, or just hard standing with direct access from the highway <p>Sheds and rear gardens:</p> <ul style="list-style-type: none"> motorcycle parking could be either a shed of sufficient size in the back garden or space for a shed of sufficient size in the back garden or a back garden of sufficient size with good rear access and turning space; in the case of the latter three, access is crucial

Land-use	Standards
	<p>Motorcycle parking outside the curtilage of a property:</p> <p>Parking on road:</p> <p>The majority of motorcycles are owned by people who also own cars, and parking them in the road if access to the back garden is not available can be particularly problematic in terms of damage and security. On-road parking is not recommended.</p> <p>Communal motorcycle parking areas or stores:</p> <p>Communal motorcycle parking space must be provided where there is no private car or motorcycle parking provision (e.g. flats), to avoid problems caused by nuisance parking.</p>

Table 4.3 Land-use specific requirements for motorcycle parking

Motorcycle parking levels:

The Parking Strategy in Somerset's Future Transport Plan provides parking standards for motorcycles in new developments. For travel plan developments, provision should be related to the modal share targets in the travel plan, which generally account for 0.5-1% of all commuting trips.

4.3.2 Cycle parking specifications and examples

A fundamental part of encouraging people to cycle is providing cycle parking in new developments and at any location where people can realistically be expected to cycle.

"The absence of secure, convenient cycle parking can be a serious deterrent to cycle use"⁽²¹⁾

This section provides guidance on the principles and standards which must be applied when providing any cycle parking through a planning application or travel plan to ensure that it is suitable for purpose and likely to be well used. Cycle parking should be approached with the same attention to detail as all other parts of a development project.

Quality of cycle parking

Table 4.4 sets out the expected design features of cycle parking.

21 Department for Transport (2008), LTN 2/08 Cycle Infrastructure Design

Characteristic	Standards
Location/Design	<p>Parking should be sited close to the building entrance in an area that feels safe to use both day and night for all potential users.</p> <p>The need for covers or canopies and further specifications are set out in Table 4.6 below. Cycle parking should be suitable for its surroundings and intended use.</p> <p>Design of stands:</p> <p>The type of stand provided must be suitable for effectively securing the bike by the frame as well as the wheels. The simplest, most effective and preferred type of cycle parking is the basic Sheffield Stand design⁽²²⁾, comprising a metal hoop sunk into concrete or bolted to the ground, ideally with the addition of a lower horizontal bar to secure smaller bicycles. These form the basic standard of cycle parking required. All stands must be made of robust materials and fixed securely to the ground. Stands which can only be used to secure the front wheel are never acceptable. These and other types of stand that are specifically not accepted are included in Transport for London's guidance⁽²³⁾.</p> <p>Cycle spacing requirements:</p> <p>These are given in Figure 4.5 Increasingly non-standard cycles with tag-along child bicycles, child buggies, cargo-style bicycles and styles such as recumbents and tricycles are used; these should all be taken account of. See Table 4.6 below.</p>
Security	<p>Natural surveillance and CCTV increase perceived security and reduce the likelihood of theft or vandalism. Signs indicating that the area is under CCTV surveillance will also help to deter thieves, though natural surveillance (e.g. by siting the stands in busy, open areas) is preferable.</p>

22 Transport for London's guidance ('Workplace cycle parking guide') provides a review of many cycle parking styles, and lists those 'not recommended' as (pp12-13): two-level wheel or handlebar racks; two-level upright racks; 'butterfly' racks; railings or street furniture; wheel slots in concrete

23 These include drainpipes, railings, front gardens, and specific types of cycle rack/stand

Characteristic	Standards
	<p>If the parking area is likely to be used after dark, the parking area and the route between the cycle parking and building entrance must be adequately lit to ensure people feel safe accessing their bike after dark.</p> <p>Communal cycle stores:</p> <p>Compounds can be made very secure with access controlled by swipe cards or keys. This may be necessary for long-term parking in unsecured areas e.g. office compounds/residential stores, or where there are vandalism/theft problems.</p>
Access	<p>It should be easy to get to without detours and must be accompanied by lowered kerbs to allow easy use without the need to drag or lift the cycle.</p> <p>The stands themselves must be spaced to allow users all access all the stands without scratching or tangling their bicycle with neighbouring bikes. Cycle parking should never form an obstruction to pedestrians. It must comply with the Disability Act 1995 and meet local health and safety requirements. It is desirable not to place cycle parking adjacent to smoking shelters.</p> <p>All users must be able to access the cycle parking easily, regardless of age or physical capabilities. This is especially important where the facilities are likely to be used by more vulnerable users e.g. children, elderly people, parents transporting small children or disabled users of specialist cycles.</p> <p>A conventional bicycle is 1800mm long by 650mm wide. When designing cycle parking it should be borne in mind the need for a cyclist to easily and conveniently manoeuvre their bike into and out of a bicycle stand, i.e. their swept path and the turning spaces needed (see Figure 8). Research has shown⁽²⁴⁾ that a minimum aisle width of 2 metres is required to turn a bicycle through 90 degrees.</p>

24 Cambridge City Council (2010) Cycle Parking Guide for New Residential Developments
http://www.cambridge.gov.uk/public/docs/CycleParkingGuide_std.pdf

Characteristic	Standards
	<p>The design, ergonomics and location of the compound is also important as an unattractive, poorly lit compound will put people off using it and render the facility ineffective. Such proposals will not be accepted as part of a travel plan.</p> <p>Doorways:</p> <p>To access cycle parking cyclists may need to be able to push their bike and open the door at the same time. The average width of a cyclist pushing a bike is approximately 1200mm. Doorways should ideally be a minimum width of 1300mm with 1500mm preferred to enable cyclists to pass through without knocking the bike on the door frame.</p> <p>When opening a door a cyclist needs to stretch to open the door and then hold the door open whilst passing through with their bicycle (if the doorway is not, as is preferable, mechanically or electrically assisted). This can be particularly problematic if doors are spring loaded to close automatically. If there are consecutive doors the building layout must take account of the space need by cyclists with bikes to negotiate these easily; 3.5m distance between doors is a suggested minimum.</p>
Signing	<p>Cycle parking facilities must be easy to find, clearly signed and sign-posted. Signage in 'house style' can demonstrate corporate commitment to sustainable travel.</p> <p>For long-term parking e.g. at office or residential sites, information about management of the premises and security arrangements may be of use.</p>

Table 4.4 Cycle parking requirements

Location of cycle parking

Table 4.5 sets out where cycle parking should be placed for different development types.

The first thing to consider is who will be the primary users of the parking that you are providing. This will help to determine the type of parking to provide.

Duration of stay	Standards
Short stay	Close (5-20m) to destination and visible but not obstructing footways or access.
Medium stay	Close (5-30m) to destination. Sheltered with a canopy, cover or building .
Long stay	Reasonable distance from entrance (10-20m for residents, and 10-50m for employees/commuters) but still visible. Must be enclosed and secure . Long term parking for staff or visitors, particularly where bicycles are likely to be left overnight or there is a risk of vandalism or theft, must be in a lockable enclosure or within a building with no public access. Lockers, showers and facilities to store and dry outdoor clothes must be provided (see section 3.1.2 above).
Residential	The type of dwelling will dictate the type of cycle parking that can be provided. Cycle parking should be integrated into the design and structure of buildings and should in all instances include locking points and/or stands. Cycle parking within the curtilage of a property: Sheds and lockers: Cycle parking may be provided either within the body of the building (e.g. porch) or in a secure shed, garage, outhouse or locker . The cycle parking must be accessed easily without cycles needing to be carried or dragged for long distances, through the living areas of the house or up/down steps and of sufficient size to enable bicycles to be easily manoeuvred inside (at least 2m depth). Storage must be built of robust materials , be lockable (or dedicated securing points provided inside) and/or of a custom-made design for storing bicycles (see SecurebyDesign standards). If the storage is to be provided at the rear of the property, there must be rear access ways of at least 1.5m width.

Duration of stay	Standards
	<p>Garages:</p> <p>If cycle parking is to be provided within a garage also intended for car parking, additional space for the bicycles must be provided. There must be at least 1.5m access between the side of the car and the wall of the garage through which to manoeuvre bicycles⁽²⁵⁾.</p> <p>Cycle parking outside the curtilage of a property:</p> <p>Communal cycle parking space must be provided where there is no private provision (e.g. flats), to reduce the risk of theft. This must be fully enclosed and secure (e.g. a compound) with good access and separate from bin stores and motorcycle parking spaces. A management and maintenance regime should be included if a lockable enclosure is to be provided (e.g. using key-operated, keypad or electronic access) to ensure continued, convenient use into the future.</p>

Table 4.5 Land-use specific requirements for cycle parking



Figure 4.1 Example of medium-term cycle parking solution

25 <http://www.securedbydesign.com/pdfs/newHomes2009.pdf>



Figure 4.2 Example of long-term cycle parking solution

Cycle parking levels:

The Parking Strategy supporting Somerset's Future Transport Plan provides parking standards for bicycles in new developments. For travel plan developments, provision should be related to the modal share targets in the travel plan, which generally account for 10-20% of all commuting trips.

For residential developments, it will need to be provided at a basis of at least 1:1 per bedroom (rather than dwelling), to enable storage of more than one cycle if more than one person is likely to be living in a dwelling. Residents commonly also own more than one cycle each.

Type of cycle	Length (mm)	Width (mm)
Conventional Bicycle	1800	650
Bicycle and 850mm wide trailer	2700	850
Bicycle and 'tag a long'	2750	650
Tandem	2400	650
Conventional Bicycle + cyclist pushing it	1800	1200

Table 4.6 Bicycle dimensions. For the footprint for a bicycle when parked please see Figure 4.3.

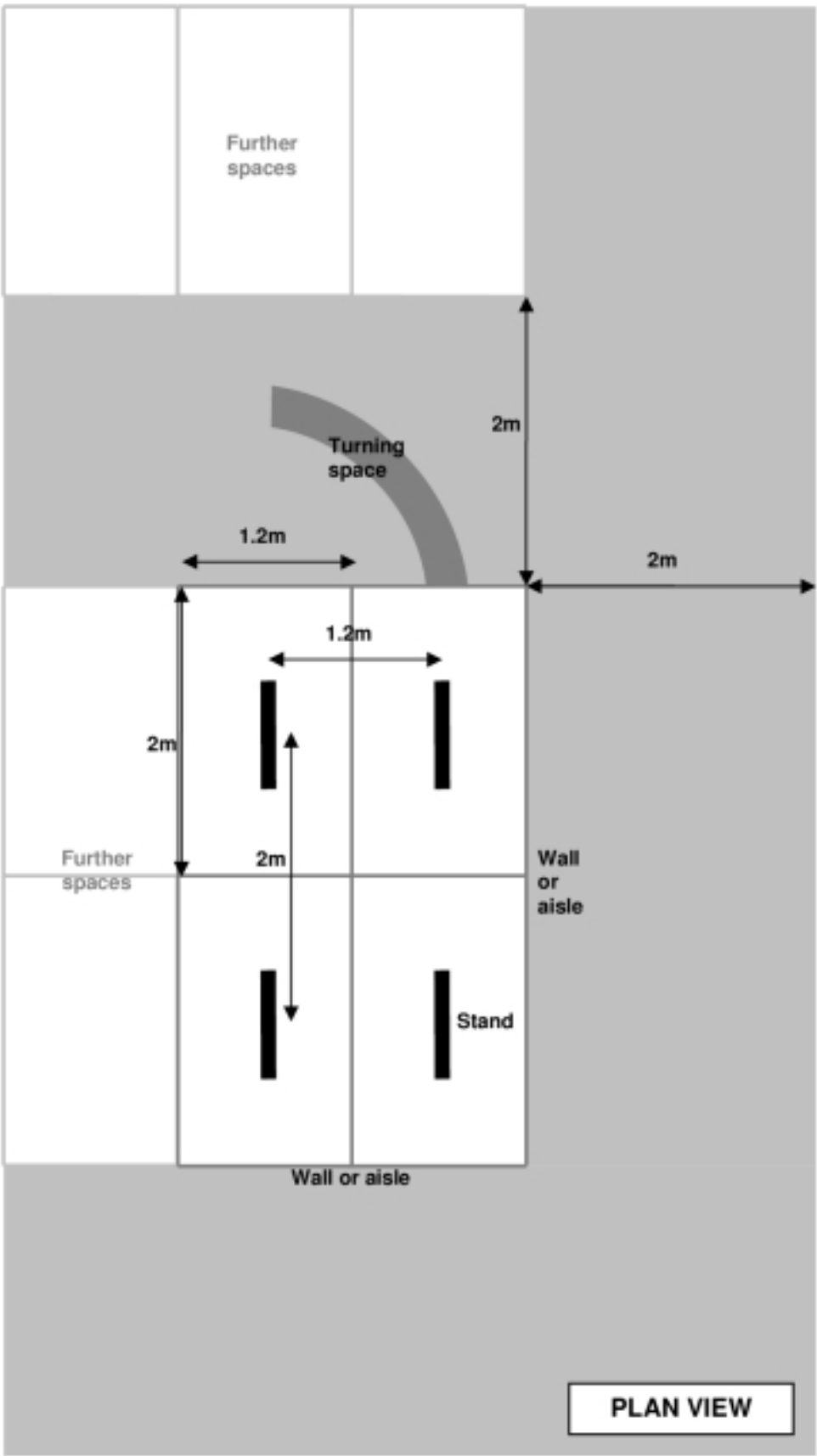


Figure 4.3 Cycle parking spacing requirements

5 Securing Travel Plans

This section describes how an approved travel plan must be legally enshrined to secure the delivery of measures and outcomes contained within it. It also deals with mechanisms for delivering measures and outcomes in the event of default by the developer.

Using legal agreements for travel plans

TVS 13

A Full Travel Plan schedule within s106 agreements will be used to secure the implementation of Full Travel Plans which must be agreed prior to the signing of the agreement. The LHA will be a signatory to these agreements.

The Government has set out a national framework for the collection of financial contributions from developers that can be put towards meeting the objective of reducing vehicular trips. The policy context for this is set out in Section 1. Planning obligations will be used with due regard to their relevance to planning considerations and relationship to the development in question, and reasonable in terms of their necessity and in the scale and the size of the contribution.

Full Travel Plans when agreed will be secured through Section 106 agreements, using a schedule based on the LHA's standard template. A standard s106 template is used throughout Somerset and provided as Appendix 8 which provides for the operation and monitoring of the travel plan.

What the agreement should include:

- Approved travel plan as an appendix to a planning obligation schedule to aid the interpretation of the planning obligation set out in the deed
- Obligations for the developer to carry out the actions in the travel plan
- Financial commitments and contributions to cover the role of third parties in the travel plan (for example for the LHA to implement highways works, provide leaflets or personal travel planning services, or supervise the ongoing operation of the travel plan)

The preference will always be to use s106 agreements over unilateral undertakings.

Obligations remain operative in perpetuity in relation to negative restrictions and the obligation to maintain and monitor the travel plan. Where the implementation of measures is promised by the developer, financial security must be provided by the developer to ensure that the fundamental measures can still be implemented in the event of default by the developer.

TVS 14

Travel plans may be safeguarded with measures or funds (as bonds, ESCROW accounts or cash sums) to cover the achievement of travel plan outcomes in the event of default by the developer/land owner or occupier/leaseholder.

Use of planning conditions

Commitments made through a s106 agreement may also be supported by the use of planning conditions (Figure 5.1).

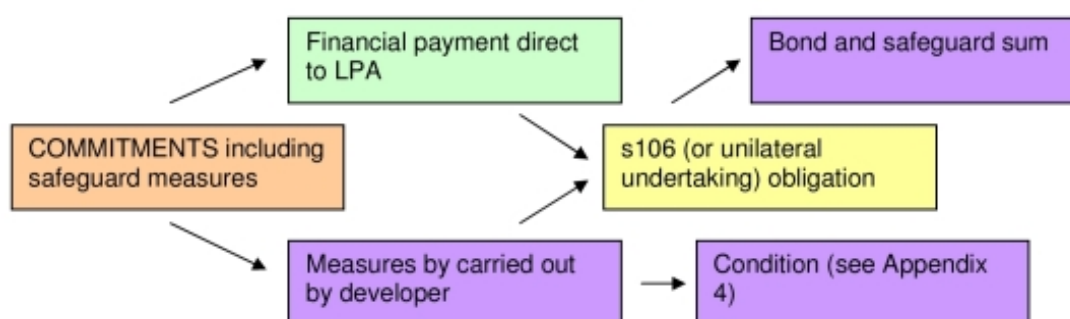


Figure 5.1 relationship between the different legal and financial mechanisms

Section 106 agreements are preferred over the sole use of conditions⁽²⁶⁾ for Full Travel Plans, although they may work side-by-side. Detailed conditions which refer to individual elements of a travel plan may be suitable for securing travel plan statements and measures-only travel statements, or specific elements from a Full Travel Plan that require approval at some future time. Further information about the use of conditions is given in Appendix 4.

Method of securing travel plan	Enforcement options
Planning condition	<p>Enforceable against any developer who implements that permission and any subsequent occupiers of the property.</p> <p>Breach of Condition Notice pursuant to Section 178A or Breach of Condition Enforcement Notice pursuant to Section 172 of the Town and Country Planning Act 1990 issued by the Local Planning Authority</p>

Table 5.1 Use of conditions and enforcement options

26 A 'Grampian' condition is a planning condition that prevents the start of a development until off-site works have been completed on land not controlled by the applicant

“The complexity of most travel plans will mean that a planning obligation is the most effective means of securing its delivery.” DfT/DCLG (2009:9, Summary).

5.1 Procedure in the event of breach of Travel Plan commitments

Travel plan breaches fall into two main categories. They may be dealt with by a range of responses. This is summarised in Figure 5.2.

Breaches are triggered by the following circumstances, as outlined in Figure 5.2, below:

- a modal share target is missed - as verified by questionnaire survey data and as supported by automatic and/or manual counts
- an action has not been found or reported as being complete within three months of the due date (including the collection and reporting of survey data and any other follow-up or administrative actions)

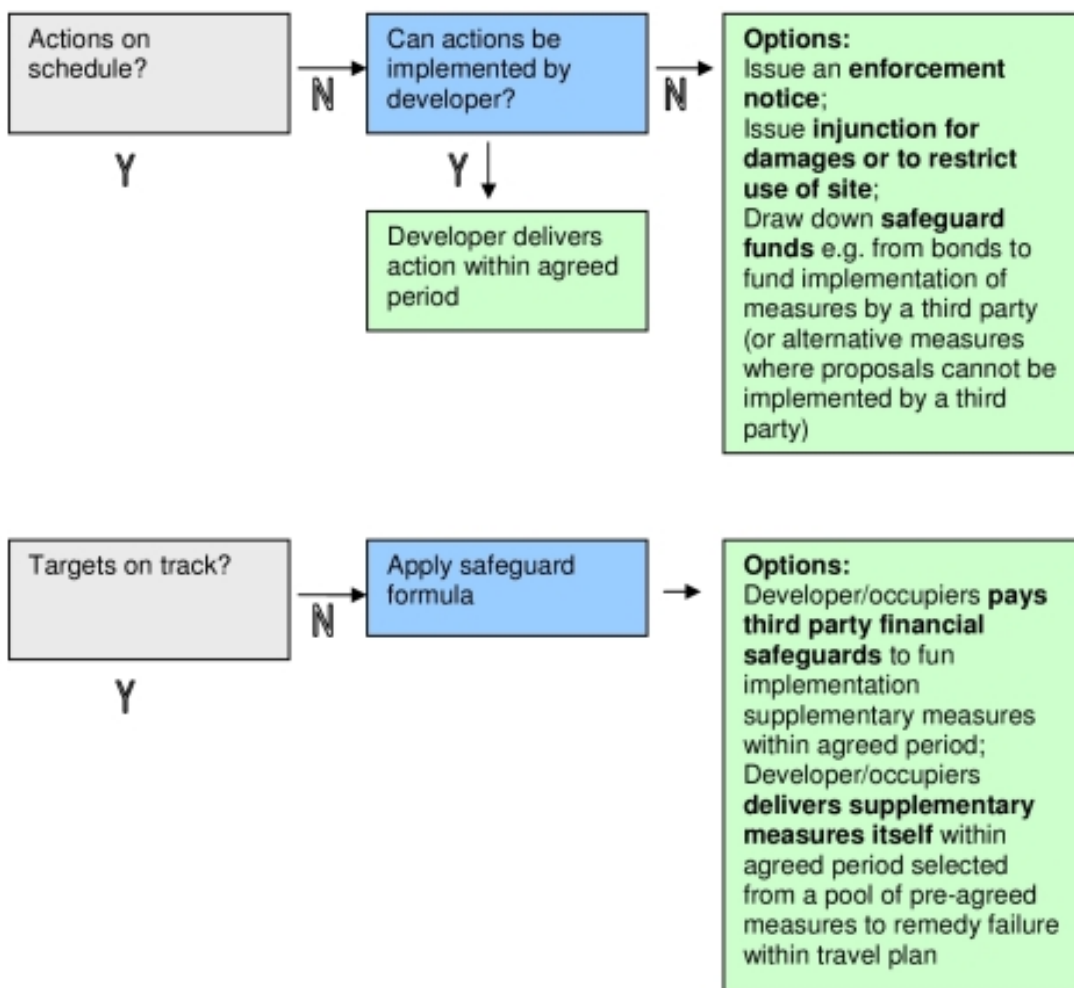


Figure 5.2 Flowchart to deal with travel plan breaches (dependent on method of securing travel plan)

If a breach is identified, the developer will be notified and required to meet with the LHA within 28 days of said notice. The LHA or its contractors will have the right to enter the development to implement any agreed measures or implement any alternative measures where the agreed measures cannot be implemented in pursuit of remedying the failures identified. The developer will not obstruct the involvement of any third parties in the delivery of travel plan measures.

Procedures if an action is missed

The procedures in the event of an action not being implemented may include:

- **Financial compensation through a bond or fund for a third party to implement the action.** Where the action cannot be delivered by a third party, the monies will be used to implement alternative measures to deliver the agreed outcomes. The compensation to cover measures not being implemented should not be confused with the financial safeguards to be drawn down in the event of targets not being met
- **Liquidated damages**
- **A restriction on the build-out or occupation of the development until the failure has been corrected**

Failure to report modal split data or the completion of actions is taken as an action being breached.

Procedures if a target is missed

The procedures in the event of a target being missed are may include (see Table 15):

- **Implementation by the developer or occupiers of extra agreed measures** to remedy failures in the travel plan to deliver its targets.
- **Implementation by a third party or occupiers of extra measures to deliver agreed outcomes using the financial safeguards** in the travel plan.
- **A restriction on the build-out or occupation of the development until the failure has been corrected**

The fulfilment of all measures in the initial action plan will not be taken as a justification to waive requirements to meet modal share targets; it is the responsibility of the developer to devise and implement an outcome-driven travel plan which is capable of meeting the modal share targets, and/or of being enhanced by further measures as set out in the list of safeguards.

Limitations on the way the development site can be used or developed further may be particularly effective in the case of large scale proposals where the development under a particular planning permission is to be phased over a period.

- Residential travel plans:

For residential developments, the preference will be to focus on the measures implemented, rather than the outcomes achieved, when applying safeguards in recognition of the external influences that might act upon travel choice in the domestic setting. This sentiment does not apply to workplace travel plans.

5.2 Measures deliverable by the developer and the LHA in the event of breach

Safeguards will be used as the preferred mechanism for securing delivery of the travel plan. An injunction⁽²⁷⁾ will only be used where the agreement to provide the agreed safeguards has been breached or there are no other alternatives.

Type of safeguard/responses in the event of travel plan failing to meet modal share targets (to be agreed during travel plan negotiations)	Implement-able by developer/ occupier?	Measures implement-able by LHA?
	If yes, developer can implement without payment to the LHA	If yes, then payment needed if LHA required to implement
Encouragement:		
Revisions to recruitment and terms and conditions of employees, e.g. Creation of a business travel hierarchy or parking restrictions	Occupier	No
More active marketing incorporating a shift of focus, e.g. A site-specific travel awareness campaign	Occupier	LHA
Additional training	Occupier	LHA
Additional financial incentives to individual staff/visitors/residents — (e.g. Contributions towards public transport tickets)	Occupier	LHA
Further promotional support for non-car modes of transport	Occupier	LHA
Additional financial support for public transport services	Payment to third party	LHA

27 Injunction proceeding pursuant to Section 106(5) of the Town and Country Planning Act 1990 issued by the County Council. Section 106 agreements are enforceable against the person who entered into the obligation and any person deriving title from that person.

Type of safeguard/responses in the event of travel plan failing to meet modal share targets (to be agreed during travel plan negotiations)	Implement-able by developer/ occupier?	Measures implement-able by LHA?
	If yes , developer can implement without payment to the LHA	If yes , then payment needed if LHA required to implement
Additional infrastructure for walking, cycling and public transport	Occupier (on-site), otherwise payment to third party	LHA
Enforcement:		
Additional parking enforcement	Occupier	LHA (off-site)
Additional parking management on site including introduction of, or increases to, charges and access restrictions e.g. Signing and lining	Occupier	No
Additional parking management off-site including introduction of controlled parking zones	Third party	LHA (and LPA)
Access controls to keep vehicles on-site, e.g. Control of signals	Occupier and/or third party	LHA
Exemplification:		
Working with neighbouring developments and the surrounding area to develop their own travel plans to 'off-set' traffic from the new development	Occupier	LHA (in partnership)
Enablement:		
Traffic management, including information systems to maximise use of existing highway capacity	Payment to third party	LHA
Highway works that support travel by non-car modes	Payment to third party	LHA

Table 5.2 Role of the LHA and developer in implementing safeguards. Modified from (p118-119) DfT/DCLG (2009)

All Full Travel Plans should contain funding for safeguard measures to cover the breaches outlined in section 5 above. Measures will normally be bonded, safeguarding funding for implementation of measures in the event of default.

Funding of safeguards in relation to breaches of modal share targets

Targets must have separate safeguard sums attached to them. The safeguard sum itself will normally need to be bonded or made available to the LHA in advance (as an ESCROW account and subsequently refunded if no breaches occur).

There is an understanding that LPAs will pass on safeguard monies collected from the developer for the LHA to hold where implementation of the safeguard measures involves the County Council.

The two methods for developers to provide safeguard sums are set out below.

Disbursement model: payment is taken upfront and either used or returned:

- If targets are missed, a disbursement fund (e.g. an Escrow Account) will be drawn upon at a rate and amount (using modal share and vehicle traffic generation data) which reflects the degree to which targets are missed (e.g. Appendix 12). Money to cover the safeguards will normally be paid prior to the commencement of the build.

Obligation model: where money is paid (or drawn down) only where a breach of the agreement occurs:

- An obligation which is placed on the developer (through a direct payment or bond) or end-users (e.g. through a management levy) in the event of default. On multi-occupier sites, individual companies may be obliged to deliver measures through the s106 agreement should it be found that their operations are contributing towards a failure to meet the modal share targets set out in the travel plan.

5.3 Role of the Highway Authority

Aside from direct obligations entered into by the highways authority, the success or failure of the travel plan should not hinge upon direct input or management of the developer or occupiers in the delivery of their travel plan commitments. It will be expected that the travel plan will operate effectively independently of any LHA involvement, for the purposes of enforcing the travel plan. The travel plan should not have to rely on the external input of the local authority in order to be sustained.

Failure to reach agreement with the LHA in a timely manner should not exclude the developer or occupiers from taking sensible steps to implement measures that are likely to form part of that travel plan, in accordance with any draft travel plans that might exist or related travel plan obligations or conditions that could otherwise be implemented as set out in this document.

Appropriate time should be allowed for the advance approval of the travel plan of travel plan measures ahead of the milestones set out in the travel plan or condition/legal agreement. This means developers should plan well in advance when submitting documents for approval and liaise with the LHA over the likely timescales involved.

The LHA will in as far as it is able work with those unfamiliar with Travel Plan matters to provide advice and support for the Travel Plan to be fulfilled, as commensurate with services provided by the Travel Plan Fee.

5.4 Further Issues to Consider

It is intended that actions and targets in travel plans will be reasonably achievable; the granting of a planning consent with unachievable goals is not helpful to any parties. It is the intention of the LHA to work in partnership with developers, occupiers and communities to ensure the delivery of the measures and outcomes in travel plans.

Safeguards are only intended to be used as a last resort, however, they form an essential part of the travel plan in the event of the process of delivery for the travel plan breaking down. Moreover, they should be seen as incentives for the travel plan to succeed.

The options and statements set out in this guidance do not preclude the LHA or the LPA from applying any alternative legal remedy that is deemed appropriate in the specific circumstances of a particular development.

If, during the course of implementing a travel plan, there is a disagreement between the LHA and the person or body responsible for implementing the travel plan over whether actions have been implemented or targets reached, or whether a travel plan has reached the appropriate quality, then an independent arbitrator will be appointed. This arbitrator must be competent in legal terms, be a professional with knowledge of travel planning and be agreeable by both parties. The opinion, including the allocation of costs, expressed by the arbitrator will be binding on both parties.

Under no circumstances shall the ignorance of the developer, owner or occupier of the development site regarding the agreed Travel Plan requirements be considered as a mitigating factor such that such requirements are waived.

6 Implementing, Managing and Monitoring the Travel Plan

The measures agreed in the travel plan must be implemented and their effects monitored. The operation of the plan should be managed and supervised throughout the life of the development. This section outlines the requirements and responsibilities for the ongoing operation and management of the travel plan.

6.1 Long Term Management of the Travel Plan

The Travel Plan Co-ordinator for the site should be responsible for reporting against the travel plan targets and action plan entered via www.iontravel.co.uk.

Travel plan responsibilities:

The management (TPC) function will need to be fulfilled at least throughout the construction of the development, to occupation and for the agreed monitoring period (normally between 5-20 years after 80% occupation). In many instances, travel plan measures will be expected to remain in place in perpetuity.

Should the development be failing to deliver against the travel plan targets by the end of the monitoring period, it is reasonable to require the travel plan coordinator role to be extended. The travel plan coordinator role can be handed on to successive organisations during such time period, e.g. from developer to management company, residents' association or occupiers.

- Managing residential travel plans:

The responsibility for the travel plan lies with the developer in the case of residential travel plans. Where management of the travel plan is allocated to a site management company or a contracted consultant, a named individual must be nominated as the travel plan coordinator. All costs are payable by the developer holding the freehold.

- Managing non-residential travel plans (excluding schools):

For all land-uses other than housing, the developer, owner or occupiers must accept responsibility for implementing and monitoring the travel plans. Participation in the travel plan is a requirement upon all occupiers (where they are not landowners), and this should be included within the terms of the lease; however, where such terms are not included, the requirement will still apply. Ongoing costs may be payable by the developer or owner holding the freehold, or the leaseholder or management company.

- Management of multi-occupier and mixed-use sites:

On large developments with a range of uses and more than one occupier, one coordinator or manager (or Travel Management Organisation or TMO) must be employed to coordinate the travel plan for the development or areas.

6.2 Monitoring the Travel Plan

The travel plan must be monitored regularly to ensure:

- the measures agreed in the Action Plan/planning permission are being implemented (and remedial measures identified are being implemented if not)
- it is delivering the modal shift required by the targets
- it is up-to-date and effective as possible as situations change and new opportunities emerge e.g. new transport facilities are created, attitudes change, new development occurs, employer/employee needs change, staff and residents move on

As with the management of the rest of the travel plan, the responsibility for monitoring all travel plans lies with the developer, owner or occupier of the development. This includes collecting and reporting data as required by the travel plan (see also section 3).

Note: Any proposed alterations to the agreed content of the travel plan must be agreed by all parties. These include actions being removed from the action plan, and the addition of measures that might act to negate or render ineffective measures agreed in the action plan.

Evidence retention:

Evidence of implementation of soft or ephemeral measures will need to be kept for inspection by the LHA as proof that measures have been implemented; examples include where travel plans have required jobs to be advertised with travel information included, or copies of past newsletters etc.

Length of monitoring period:

The standard monitoring period applies between the first and 80% occupation of the development plus the five years following the 80% occupation of the development (or each identified phase within the development).

For large developments the length of the monitoring period required may be extended beyond the standard monitoring period of five years after 80% occupation. This requires commitment from occupiers and owners. Monitoring for 9 or up to 20 years or more is reasonable where failure to continue to manage travel would result in unacceptable outcomes in terms of traffic or other considerations.

Monitoring will be required until it can reasonably be demonstrated that the travel plan is consistently meeting its targets; after this has been demonstrated, the frequency of monitoring may be reduced following the initial period. The developer/owner shall maintain contact with the LHA via the online tool (iOnTRAVEL), and must update it with survey data as surveys are implemented.

- Carrying out actions in the travel plan

Developers using iOnTRAVEL will receive reminders of their commitments (which refer to the approval, preparation and operation of their travel plan) via automated emails, triggered by the schedule of actions entered at the start of the travel planning

process (see Figure 2). Confirmation/evidence that the agreed actions have been carried out must be uploaded to iOnTRAVEL to be checked and approved by the LHA via the same system.

- Collection, calculation and presentation of modal split survey data

The submission by the developer of survey data is carried out using iOnTRAVEL. Questionnaire surveys (on paper or online) are the main method of monitoring a travel plan, though other methods may be used to supplement this data (see Appendix 11). Automatic counts of vehicle trip rates will, in particular, be used to corroborate modal share evidence collected through questionnaire surveys. A mean average of counts and questionnaire data may be taken as a definitive modal split.

In all cases, the method and schedule of monitoring must be agreed with the LHA as part of the travel plan process. The LHA produces a series of standardised survey forms and questionnaires which must be used where relevant to enable cross-comparison of data across the county.

TVS 15

Permanent Automatic Traffic Counters must be installed at all developments exceeding the thresholds for Full Travel Plans. All developments must comply with the LHA's monitoring requirements in order to get consistent and comparable data over time across all developments with travel plans in Somerset.

- Monitoring at the end of the agreed initial travel plan period

In all cases, the LHA reserves the right to carry out a sample survey itself to ensure that monitoring is being carried out correctly, and to request an independent audit of the data collected from standard surveys at the developer's or owner's expense.

TVS 16

A fresh, updated travel plan must be prepared and approved at the end of any monitoring period agreed as part of the planning permission for a development. This will lead to a Statement of Travel Plan Compliance being issued by the LHA.

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Contributors and Acknowledgements

Various sections of Somerset County Council provided advice and help in the production of the content for this guidance, particularly Transport Policy, Highways Development Control, Estates Roads, and Legal Services teams.

The development of the guidance was informed by various national guidance documents and examples of travel planning guidance in other authorities, particularly Merseyside, Buckinghamshire, Coventry, Cheshire, East Sussex, Bracknell Forest, Surrey, Kent and North Somerset. It was updated with the work of Lynda Addison and colleagues in the form of the DfT/DCLG 2009 guidance on travel planning.

This document has benefited from the consultation exercises outlined at the beginning of the document.

Abbreviations and Glossary

AQAP	Air Quality Action Plan
AQMA	Air Quality Management Area
ATC	Automatic Traffic Counter
BMF	British Motorcyclists' Federation
DCLG	Department of Communities and Local Government
DfT	Department for Transport

GFA	Gross Floor Area
HA	Highways Agency
HDC	Highways Development Control
iOnTRAVEL	Somerset's online travel plan monitoring system (www.iontravel.co.uk)
LHA	Local Highways Authority (SomersetCounty Council)
LPA	Local Planning Authority
LTP	Local Transport Plan
MfTP	Manual for Travel Plans
MoTS	Measures-only Travel Statement
NO2	Nitrogen Dioxide
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
RSS	Regional Spatial Strategy
s38	Section 38 agreement. Section 38 (s38) of the Highways Act (1980) is used to ensure that the County Council, as the Local Highways Authority, adopts roads in new estates for future public maintenance.
s106	Section 106 agreement. Section 106 (s106) of the Town and Country Planning Act (1990) allows a local authority to enter into a legally-binding agreement or planning obligation with a landowner in association with the granting of planning permission.
s278	Section 278 agreement. Section 278 (s278) of the Highways Act (1980) is used where works are to be carried out on the existing adopted highway. Examples include the construction of new access/junction alterations, traffic calming or improved facilities for pedestrians and cyclists. The County Council may provide works at the developer's expense, or allow the developer to provide the works directly subject to approval.
SCC	SomersetCounty Council
SOV	Single Occupancy Vehicle
SPD	Supplementary Planning Document
SRN	Strategic Road Network

SW	South West
TA	Transport Assessment
TP	Travel Plan
TPC	Travel Plan Coordinator
TPS	Travel Plan Statement
TRO	Traffic Regulation Order
TS	Transport Statement

References

Department for Transport (2001) **PPG13: Transport**

Department for Transport (2007) **Guidance on Transport Assessment**

Department for Transport and Department of Communities and Local Government (2009) **Delivering Travel Plans through the Planning Process**

SomersetCounty Council (2008) **Manual for Travel Plans**

Transport for London (2006) **Workplace Cycle Parking Guide**

Transport Initiatives (2008) **Draft Residential Cycle Parking Guide**

See also Table 1.1 for references to relevant policies and acts.

Web links:

www.movingsomersetforward.co.uk/new-developments

www.iontravel.co.uk

Appendices

List of Appendices

1. Requirement for School Travel Plans through Development Control
2. Residential Travel Vouchers
3. Travel Plan Approved Record
4. Use of Conditions
5. Avoiding the activation of safeguards: a travel plan risk assessment
6. Template Travel Plan for Major Developments
7. Annual Report Template
8. Draft Standard s106 Schedule
9. Measures-only Travel Statement and Table of Measures Template
10. Business Travel Policies Dossier Template
11. Survey types
12. Calculation of the safeguard sum
13. Residential Travel Plan Heads of Terms

Appendix 1

Requirement for School Travel Plans through Development Control

Requirement for School Travel Plans through Development Control

Type of Application:

Level 1	Works to school are on existing school site and do not cause any significant changes in capacity, access arrangements, catchment area or operational procedures (e.g. extended community use).
Level 2	Works to school are on existing site , but involve changes to one or more of the following: <ul style="list-style-type: none"> • Increase in capacity of over 10% or 100 pupils, whichever is the smaller. • Changes to access routes either into or within site • Changes to the catchment area of the school • Significant changes to operational procedure e.g. new facilities allowing public or community access, extended opening hours
Level 3	School is moving in whole or part to a new site or application is for a new build.

Information Required

Level 1	<ol style="list-style-type: none"> 1) School Travel Plan for existing site written within last 2 years and reviewed within the last 12 months. 2) Commitment to review travel plan within 6 months of completion of new works.
Level 2	<p>As for Level 1 plus the following:</p> <ol style="list-style-type: none"> 1) Details of capacity, access, catchment and operational changes and an analysis of how this might affect travel to school habits identified in the travel plan. This should include plans of relevant details, e.g. maps showing expected home locations of new pupils where there is increased capacity, plans showing new travel routes for pupils where there are changes to access arrangements etc. Details of improvements that could be made at time of works or subsequently to mitigate any potential increase in car use and/or progress sustainable travel targets in the Travel Plan. 2) Plans of new layout, including a site plan and neighbourhood map showing detailed access routes. 3) Copy of any transport assessment completed and details of any recommendations.
Level 3	<p>As for Level 2, plus the following:</p> <p>1a) (For schools moving from an existing site).</p> <ul style="list-style-type: none"> • If not already completed, schools must undertake the first stages of a Travel Plan for the existing site, to include a survey of pupil travel and identification of desires and opportunities. • Provide an analysis of transport conditions at new site and

	<p>how the move will affect the transport choices of existing and new pupils. Set targets, measures and objectives for new site (to be included in S106 conditions). Identify measures to be taken during the build of the new school to mitigate car use, facilitate sustainable travel and progress the targets set in the travel plan.</p> <ul style="list-style-type: none"> • Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition). <p>1b) (For new builds)</p> <ul style="list-style-type: none"> • Provide an analysis of transport conditions at the proposed site and how pupils are expected to travel. This should include maps of catchment area and expected home locations of pupils and maps of the main access routes from these areas. Set targets, measures and objectives for new site (to be included in S106 conditions). Identify measures to be taken during the build and promotion of the new school to mitigate car use, facilitate sustainable travel and progress the targets set in the travel plan. • Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition). <p>2) Design and Access Statement and movement diagram.</p> <p>3) Details and plans of any wider development surrounding the school and the position of the school within it. Details of links to any Travel Plans for that wider development.</p> <p>4) Plans of public transport links</p>
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Comments to be provided by:

Level 1	School travel team
Level 2	School travel team, Road safety partnership
Level 3	School travel team, Road safety partnership, Work travel team plus any other members of the team as appropriate to individual circumstances (e.g. Cycling Officer, Smarter Choices team)

Albert Ward will be the principal point of contact for all application and will disseminate and collate comments from other members of the team.

We will aim to provide comments within 3 weeks.

Appendix 2

Residential Travel Vouchers

	<p>how the move will affect the transport choices of existing and new pupils. Set targets, measures and objectives for new site (to be included in S106 conditions). Identify measures to be taken during the build of the new school to mitigate car use, facilitate sustainable travel and progress the targets set in the travel plan.</p> <ul style="list-style-type: none"> • Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition). <p>1b) (For new builds)</p> <ul style="list-style-type: none"> • Provide an analysis of transport conditions at the proposed site and how pupils are expected to travel. This should include maps of catchment area and expected home locations of pupils and maps of the main access routes from these areas. Set targets, measures and objectives for new site (to be included in S106 conditions). Identify measures to be taken during the build and promotion of the new school to mitigate car use, facilitate sustainable travel and progress the targets set in the travel plan. • Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition). <p>2) Design and Access Statement and movement diagram.</p> <p>3) Details and plans of any wider development surrounding the school and the position of the school within it. Details of links to any Travel Plans for that wider development.</p> <p>4) Plans of public transport links</p>
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Residential travel vouchers

How the voucher scheme works

STAGES:

STEPS:

Initial occupiers:

FIRST OCCUPATION

1. Developer provides letter/'voucher' that confirms a commitment to reimburse resident at 50% of the cost of each item against a set/pre-defined list of expenditure items up to a total maximum allowance for their property (listed)

Subsequent
occupiers:

QUESTIONNAIRE

2. Questions in the annual questionnaire to residents:

- a) Did your household move into this property as a new occupier or new tenant within the last 12 months?
- b) Has your household been offered a Residential Travel Voucher whilst living at this address?

VOUCHER PROVISION

3. Within one month of survey closing date, developer provides letter/'voucher' that confirms a commitment to reimburse resident at 50% of the cost of each item against a set/pre-defined list of expenditure items up to a total maximum allowance for their property (listed)

Initial and
subsequent
occupiers:

PURCHASING

4. Resident buys equipment within 12 months of receipt of voucher and sends receipts to developer accompanied by letter/'voucher' and three month travel diary (if required)

REIMBURSEMENT

5. Developer reimburses resident by cheque at their discretion within three months of claim being received

REPORTING

6. Developer informs SCC of reimbursement of expenditure and addresses with annual monitoring results

Permitted expenditure

The intention of the Residential Travel Voucher Scheme is to encourage smarter travel choices by providing a direct financial incentive to householders to reduce their car use. Somerset County Council's guidance on encouraging smarter travel is given in the Manual for Travel Plans (published by Somerset County Council, and available via www.movingsomersetforward.co.uk) in the Menu of Measures document under the Encourage theme.

The Residential Travel Voucher (or RTV) system is intended to work within the framework of a travel plan. The scheme allows flexibility for its recipients (as householders) to spend their incentive according to their preferred alternative to car-based commuting. It is the purpose of this document to qualify what constitutes reasonable expenditure, by listing the items that a householder could reasonably expect to receive compensation for. The list is intended to provide added value – things people might not normally have, not routine spending.

Items worthy of reimbursement (by mode of travel)

Note. Max. 3 any one item per household.

Walking:

- Handcart
- Luggage/shopping trolleys
- Maps of local area (inc. UK road atlases)
- Nordic walking poles
- Personal attack alarm
- Raincoat
- Rucksacks
- Shoes
- Torch (not batteries)
- Umbrellas
- Waterproof trousers

Cycling:

- Bicycle*
- Cycle clothing and accessories*

SPECIFIC CYCLING EQUIPMENT: clothing or accessories inc. shoes, padded shorts etc.; puncture repair kits; emergency lights and batteries; pump; toolkit; spares; pannier racks; panniers or other cycle bags; trailers; lock; helmet; cycles (range depending on local needs and terrains – foldable, electrically-assisted, hybrid, mountain)

Working at Home:

- Broadband (max. three months' bills)
- Computer equipment (not games) including laptop and printer
- Home office desk to value of £150
- Home office storage
- Lighting
- Office chair
- Other DSE type equipment (rests, supports, holders etc)
- Small office equipment/stationary
- WiFi router

Motorcycling:

- Motorcycle equipment including helmet (not servicing or labour costs)

Public Transport:

Bus season tickets from home (not individual tickets)

Rail season tickets for journey to work (not one-off journeys)

Not included: Training courses, car hire, taxi fares or petrol, suitcases, phone bills, one-off phone connection costs, mobile phones, telephones, computer accessories, garden shed.

Level of reimbursement

The developer will match fund any purchases made by tenants/home occupiers according to a level of expenditure per household agreed with the developer, for three tenures per property to allow for overturn of occupants in the travel plan's initial monitoring and performance period.

Current residential travel voucher values (July 2011):

Dwelling size (bedrooms)	RTV value (total) per tenure (£)
1	100
2	150
3	200
4+	250

Appendix 3

Travel Plan Approved Record

Travel Plan Approval Record

Site Reference:

Application No:

1. PREPARATION OF TRAVEL PLAN

STATEMENT OF TRAVEL PLAN APPROVAL		
Document approval prior to application iOnTRAVEL completed <input type="checkbox"/>	<input type="checkbox"/>	/ /
Document approval prior to planning determination iOnTRAVEL completed <input type="checkbox"/>	<input type="checkbox"/>	/ /
Document approval prior to legal agreement iOnTRAVEL completed <input type="checkbox"/>	<input type="checkbox"/>	/ /
Document approval prior to commencement iOnTRAVEL completed <input type="checkbox"/>	<input type="checkbox"/>	/ /
Document approval prior to occupation iOnTRAVEL completed <input type="checkbox"/>	<input type="checkbox"/>	/ /
Travel Plan details: Rev E "May 2010"	Signed and Dated Somerset County Council Travel Plan Coordinator	

2. OPERATION OF TRAVEL PLAN

Year 1 - survey data and actions submitted into iOnTRAVEL	<input type="checkbox"/>	/ /
Year 2 - survey data and actions submitted into iOnTRAVEL	<input type="checkbox"/>	/ /
Year 3 - survey data and actions submitted into iOnTRAVEL	<input type="checkbox"/>	/ /
Year 4 - survey data and actions submitted into iOnTRAVEL	<input type="checkbox"/>	/ /
Year 5 - survey data and actions submitted into iOnTRAVEL	<input type="checkbox"/>	/ /
	Signed and Dated Somerset County Council Travel Plan Coordinator	

STATEMENT OF TRAVEL PLAN COMPLIANCE		
Completion of 5-year action plan agreed	<input type="checkbox"/>	/ /
Progress against 5-year modal share targets agreed	<input type="checkbox"/>	/ /
	Signed and Dated Somerset County Council Travel Plan Coordinator	

Travel Plan Approval Record

RECORD OF SAFEGUARDS IMPLEMENTED AND ENFORCEMENT NOTICES

Dates	Actions Taken
/ /	
/ /	
/ /	
/ /	
/ /	

Appendix 4

Use of Conditions

Use of conditions

Guidance on use for travel plans

Conditions will be used only where the tests of Circular 11/95 can be met.

Conditions may be used to secure specific travel plan-related measures where a travel plan document itself is not needed, for example to secure simple measures with standard requirements such as cycle parking and upgraded bus stops¹. They may be suitable for Measures-only Travel Statements or Travel Plan Statements. Conditions will only be used in cases where the site is not complex, of small scale, and there is reasonable certainty over the intended occupier. Conditions will not be suitable to secure full Travel Plans.

They will be enforceable and shall be precise in their requirements.

Consistency of conditions:

Should the LPA wish to include a condition for the overall travel plan, it is recommended that the following principles are followed:

- The travel plan must be agreed prior to commencement, to allow physical infrastructure to be determined appropriately with the rest of the planning process
- The detail of the Travel Plan shall include:
 - A 'Site Audit Report', providing information about all existing travel opportunities to, from and within the development site for all Modes of Travel
 - An 'Action Plan' of new initiatives to improve travel options for staff, customers and visitors which shall include and not be limited to measures relating to the physical design and infrastructure in and around the development
 - A 'Monitoring Strategy' providing a methodology and schedule for monitoring all travel to, from and within the development site for all Modes of Travel by staff, customers and visitors and set of modal share targets
- The travel plan shall be both approved and thereafter implemented in full at all times
- Reasons: In order to promote alternative means of travel and to manage the effects of any additional traffic in the interests of sustainability.

¹ "Planning conditions may be appropriate with smaller developments or when the range of measures required is simple. Conditions are not appropriate when payments are required."
DfT (2009:9)

Example conditions are provided below:

For a travel plan:

Prior to the commencement of development, a Travel Plan is to be submitted to and approved in writing by the Local Planning Authority. Such Travel Plan should include soft and hard measures to promote sustainable travel along with a timetable for the implementation of the measures. The development shall not be occupied unless the agreed measures are being implemented in accordance with the agreed timetable. The measures should then continue to be implemented as long as any part of the development is occupied.

For travel plan measures:

Prior to the commencement of development, a measures-only travel statement [based on the travel plan submitted with the application] is to be submitted to and approved in writing by the Local Planning Authority. Such Travel Plan should include [travel plan contact, cycle parking, a shower, a car sharing scheme, cycle parking, motorcycle parking, signage and informational measures] to promote sustainable travel along with a timetable for the implementation of the measures. The development shall not be occupied unless the agreed measures are being implemented in accordance with the agreed timetable. The measures should then continue to be implemented as long as any part of the development is occupied.

For cycle parking:

Prior to the commencement of development, a detailed scheme for [open/covered/fully enclosed] spaces for not less than [no.] [staff and visitors', residents'] bicycles and secure parking for [no.] motorcycles is to be submitted to and approved in writing by the Local Planning Authority. The development shall not be occupied unless in accordance with the agreed scheme in terms of layout, construction and drainage.

Appendix 5

Avoiding the activation of safeguards: a travel plan risk assessment

Avoiding the activation of safeguards: a travel plan risk assessment

Why might a travel plan delivered through the planning process fail to deliver?

There are various reasons why a travel plan may fail – that is, fail to implement measures, or be ineffective at encouraging modal shift towards smarter travel choices.

The risks of this happening can be introduced, or minimized. The following stages can influence the level of the travel plan's performance against its targets:

- when the travel plan is designed,
- during the operation of the travel plan.

Influences can be internal to the organization (the way it is set up to deliver the travel plan), external to the site (involving third parties outside of the organization), or may be technical in nature (related to the process of implementation, or example the setting of targets or monitoring of the travel plan).

Travel plan troubleshooter

10 top barriers are listed below. These are common issues slowing progress towards achieving effective travel plans as introduced as part of the planning process. Similar barriers may also be applicable to travel plans implemented voluntarily by businesses.

Ways to avoid these pitfalls are suggested – to speed up the effective delivery of travel plans and their associated outcomes to reduce levels of car use and encourage more responsible patterns of movement.

1. Design: refusal, disinclination or reluctance to comply with travel plan process:

Some planning applicants may see the requirement for a travel plan as an imposition, or the travel plan has been produced at a late stage when site design or highways details have already been put forward or agreed, or at a time when urgency or time constraints dictate the process rather than a focus on achieving outcomes.

Meet with local authority at an inception meeting to discuss the approach and what is required, and what the rewards are in terms of the design and ongoing management of the site. Early (pre-application) production of the travel plan, alongside the Transport Assessment and Design & Access Statement, ensures that effort is not duplicated and travel plan requirements are met. Financial and operational implications of the travel plan need to have been taken account of early on in the design and planning of the proposals.

For the developments for which travel plans are requested, the requirements will have to be fulfilled in accordance with this guidance.

A **checklist** for developers to ensure they include the required contents for a travel plan in Somerset is available from the Resources Centre for travel plans on www.movingsomersetforward.co.uk/new-developments.

2. Operational/delivery of targets: perceived lack of control over targets:

The owner of the site does not have total control over targets, either because:

- a) the site will be occupied by a separate organisation
 - b) the site owner does not feel they have control over how staff or visitors travel
 - c) the measures in the travel plan are in the hands of third parties, e.g. bus companies
-
- a) the site owner needs to transfer the responsibility of achieving the targets and implementing the travel plan onto the occupier as part of the lease or tenancy agreement for the site, in order to comply with the planning permission which the travel plan forms part
 - b) the purpose of the travel plan is to influence the way people travel. Without aspirations for achieving a defined and managed level of car use it will not be a worthwhile exercise to have a travel plan in place. The travel plan needs to be designed to achieve these targets with appropriate measures to influence travel behaviour
 - c) the travel plan should take account of the fact that it may involve the help of third parties such as transport providers to achieve some measures or targets. However, it can contain its own measures to counteract any adverse actions by bus operators (e.g. bus fare subsidies to counteract increasing fares), and in the same way take advantage of any unexpected opportunities (e.g. new bus and cycle routes) as part of the travel plan.

A good travel plan will identify these risks and the proposed impact they may have on the travel plan.

3. Operational/delivery of targets: low level of behaviour change - People refuse to, or unable to, change their travel behaviour:

“Some members of senior management may even feel threatened by the travel plan, concerned about losing benefits.”

(Travel plan resources pack for employers, p45)

The travel plan should concentrate on targeting those willing or able to support change, and rewarding those already using travel alternatives. It should set realistic targets, and should not expect everyone to contribute strongly towards the achievement of the travel plan goals in the short to medium term.

Longer term targets should be set out for challenging the culture of an organization which does not take reducing car use seriously. Staff should be encouraged to take advantage of alternative transport choices as their life circumstances change (where they live, children growing up, changes in income etc.) and external drivers (costs of car use etc.) change. Better planning of journeys may allow for car journeys to be substituted by alternative modes, at least on an occasional basis to begin with if people are competent in planning or arranging trips by alternative modes.

Check that the perception of lack of alternative transport options matches up with reality through offering personal journey planning, or feeding back on questionnaire answers on the basis of information collected from the site audit.

Additionally, alternative measures should be proposed (should external schemes not be delivered or the package of measures in the travel plan not be as effective as anticipated).

4. Operational/delivery of targets: travel solutions do not fit into social norms or travel context:

The culture of travel choice favours the use of the car, and as such the travel plan has not been effective in encouraging and enabling the use of alternative options.

Ensure that the travel plan offers quality alternatives which bring rewards over the use of the private car, so that any sacrifices people make in terms of time, money or lifestyle are balanced with longer-term rewards. These rewards need to be communicated, and a sense of community and shared purpose or responsibility built around the ideals of the travel plan.

Further interventions and promotions or re-engagement in the travel plan may be necessary. Sometimes a figurehead in the organisation may be used effectively to win staff around who are sceptical about the goals of the travel plan, or unwilling to change their travel behaviour until they see somebody else going out of their way to do so.

Further advice on **changing behaviour** is given in the Exemplify and Encourage sections of the Menu of Measures, available as part of the Manual for Travel Plans via www.movingsomersetforward.co.uk.

5. Design: late articulation of travel plan measures:

Delayed articulation in terms of the details of the site design, measures, targets, or supporting information to be used in the formulation of the travel plan.

This causes a low level of confidence in the travel plan being effective. This can particularly be the case where outline applications have not included a travel plan or the travel plan is a condition, post planning consent.

“...deferred submission of a travel plan detracts from the local authority’s ability to secure certain elements. It also risks a delay in the travel plan implementation that may allow a pattern of car use to become established in new developments.”

(Using the planning process to secure travel plans, p56)

Government advice encourages as much information as possible to be included in travel plans submitted with all types of planning application (including outline and full applications). This includes modal split targets.

Specific commitments should be made to putting measures in place on a defined timescale, rather than hazy statements promising investigation of various proposals.

Applicants must **ensure** that a table of modal split (outcome) targets are included in the travel plan, along with a schedule of actions to show clearly the planned implementation of various measures.

6. Design and operational/delivery of targets: lack of ongoing management or site-specific management detail in the travel plan:

Organisational structures and processes are not put in place to ensure the effective delivery of the travel plan.

The travel plan needs to name the person responsible for coordinating the travel plan. This person should be employed, or allocated the time, to influence the design of the travel plan and coordinate the delivery of the various elements within the organization, across the various different departments and stakeholders that may be involved. The overall reporting lines within the organization should be stated, ensuring that problems can be addressed at the appropriate level.

The travel planner should be allocated a budget or source of funding with which to manage the travel plan and make improvements to the travel conditions on site – as well as offer incentives for smarter travel.

It is important that the site owner and/or occupier understands and owns the travel plan (the travel plan coordinator), and that it is not an on-the-shelf document used solely to gain planning permission for the site. The travel plan should be integrated into other corporate policies and management frameworks such as ISO14001 and health & safety to emphasise its wider organisational goals.

Carrying out a full site audit and survey will ensure that the travel plan is tailored to the site in question, and is not too vague to be of real use in developing solutions to travel problems. The context, aims and deliverables in the travel plan should be clear to any reader – particularly where the person charged with delivering the travel plan may not have been involved in the development of the travel plan itself. Steering groups should be set up to formalize the delivery of the travel plan, and identify any remaining tasks to complete the travel plan or develop its content. These should be monitored over time and achievement compared to the targets for modal split set out in the travel plan. An annual survey should be carried out and progress reported to senior management as well as Somerset.

Further advice on about **employing a travel coordinator** is given in the Exemplify section of the Menu of Measures, available as part of the Manual for Travel Plans via www.movingsomersetforward.co.uk.

7. Operational / delivery of targets: general failure to implement the travel plan:

Lack of an action plan or clear understanding of responsibilities and timescales for delivering measures in the travel plan.

Set out a clear action plan in the travel plan, assess risks, manage risks, and implement according to the timetable in the travel plan. Plans for accurate, complete and continuous monitoring should be included in the travel plan.

The planning process will be used to ensure the enforceability of the travel plan. This sets out remedies or financial safeguards should the travel plan not be implemented as planned.

Revisit the travel plan to decide what is realistic. Add measures to the travel plan to focus on the weakest links, or quick wins which can be used to kick-start progress.

Further advice about **achieving quick wins** for your travel plan is given in the Quick Wins section of the Menu of Measures, available as part of the Manual for Travel Plans via www.movingsomersetforward.co.uk.

8. Design: modal share targets not included in the travel plan:

The consultant drawing up the travel plan cannot devise modal share targets for the delivery of the travel plan in the longer term.

The concept of a site-wide, mixed used travel plan does not fit in well with the traditional approach to individual site specific travel plans. Commercial factors may be major issues.

Meet with local authority to discuss the approach and what is required, and what the rewards are in terms of the design and ongoing management of the site. Discuss the wider policies in the local transport plan and how all sites and travel plans are subject to the same technical evaluation and modal shift requirements.

Carry out a survey and use the accompanying advice and evidence to set appropriate modal share targets, to be measured annually on an ongoing basis in order to track progress.

Further advice on **target setting** is given under the Target Setting section of the Monitoring Guidance, available as part of the Manual for Travel Plans via www.movingsomersetforward.co.uk.

9. Operational/delivery of targets: travel plan targets not achieved despite willingness of organization and staff to be involved in the process:

People do not feel that the wider context supports the delivery of the travel plan, e.g. fear of, or levels of, crime/antisocial behaviour, intimidation by car drivers, lack of adequate transport alternatives.

Set the travel plan within wider local strategies to address these important issues. Engage with Somerset and third parties to publicise and address any inadequacies through collecting evidence in the travel plan.

Get involved in local community and employer groups/forums to raise begin to find solutions to these problems.

10. Design and operational/delivery of targets: perverse incentives which fuel car use:

Parking levels and restrictions are not considered early enough as part of the travel plan, so cannot be used to reinforce the incentives and alternative travel options developed in the travel plan.

This is particularly the case in residential developments and mixed-use employment sites.

“The choice of elements must work together as a package – elements and the way they are structured could undermine or increase the success of others.”

(Using the planning process to secure travel plans, p73)

Conflicting corporate policies, such as reimbursement rates for driving at work where staff make a profit from using their car or company cars. The design and levels of car parking should contribute towards reduced use of the private car, in combination with other measures to persuade people to use alternatives as part of the decision making process used to determine the wider planning application.

Unless barriers are removed, no matter how good incentives are they will fail to be effective.

"...removing obstacles to public transport ought to run in tandem with actions to ensure that your company does not encourage driving to work with cheap company cars, unlimited free parking or by requiring employees to drive to site just in case they have to use their car for work purposes."

(Essential guide to travel planning, p36)

An audit of organizational policies should be carried out to ensure all company policies and decisions are contributing to the travel plan rather than working against it. This will require high-level support for the travel plan within the organization.

Further advice on smarter travel policies is given in the Encourage section of the Menu of Measures and as a worksheet in the Site Audit and Design Guidelines, available as part of Manual for Travel Plans via www.movingsomersetforward.co.uk.

Appendix 6

Template Travel Plan for Major Developments

Template Travel Plan for Major Developments

[date]

Version:	[no]
Author:	[name]
Development Site:	[name]
Planning Application Number:	[no]

Contents

Introduction

Site accessibility

- General Situation
- Walking
- Cycling
- Bus Use
- Trains
- Driving
- Neighbouring Land Uses and Local Facilities

Action Plan

- Informational Measures
- Promotional Measures
- Design of the Development
- Parking Measures
 - Cycle, motorcycle and car share parking
 - Car parking
- Management Measures
- Off-site Transport Improvements
 - Bus services
 - Walking
 - Cycling

Targets and Outcomes

References

Appendices

Introduction

This travel plan covers the [name] development located [location].

The development proposals entail:

Planning application [no]:

- [use class] GFA [units]

Related planning applications [no]:

- [use class] GFA [units]

The travel plan will be secured through a Section 106 agreement accompanied by a full schedule outlining the principal commitments from the travel plan. The travel plan document will be appended to the s106 agreement for context.

The planning application is being put forward by [developer name].

Site accessibility

A full audit has been undertaken of the accessibility of the development site by all modes of transport to all relevant destinations such as workplaces, residential areas, transport nodes and facilities.

This section outlines these linkages in full, using information collected from the Transport Assessment. Where deficiencies in the network have been identified that mean with the effect of the proposals there will be limitations arising, remedies are put forward within the Action Plan to address these deficiencies.

GENERAL SITUATION

The site is to the [aspect] of [town] approximately [distance] km to the [aspect] of the town centre as shown at Appendix 1.

The area surrounding the site is mainly [urban/rural etc.].

Information on the site audit should be collected according to the Site Audit Guidelines and summarised under the headings below for each mode of transport.

WALKING

Walking	Findings
Accessibility	[summary]
Safety and security	[summary]
Comfort	[summary]
Information	[summary]

CYCLING

Cycling	Findings
Accessibility	[summary]
Safety and security	[summary]
Comfort	[summary]
Information	[summary]

BUS USE

Bus use	Findings
Accessibility	[summary]
Safety and security	[summary]
Comfort	[summary]
Information	[summary]

Service	Frequency of services	Destinations	First arr/dep	Last arr/dep	First arr/dep	Last arr/dep	Fare and journey times to nearest main destinations
			Direction 1 - Towards [town A]		Direction 2 - Towards [town B]		
Monday to Saturday							
[service]	Every [mins]	[destinations]	HH:MM	HH:MM	HH:MM	HH:MM	£[cost]
Sunday							
[service]	Every [mins]	[destinations]	HH:MM	HH:MM	HH:MM	HH:MM	£[cost]

TRAINS

Trains	Findings
Accessibility	[summary]
Safety and security	[summary]
Comfort	[summary]
Information	[summary]

Service	Frequency of services	Destinations	First arr/dep	Last arr/dep	First arr/dep	Last arr/dep	Fare and journey times to nearest main destinations
			Direction 1 - Towards [town A]		Direction 2 - Towards [town B]		
Monday to Saturday							
[service]	Every [mins]	[destinations]	HH:MM	HH:MM	HH:MM	HH:MM	£[cost]
Sunday							
[service]	Every [mins]	[destinations]	HH:MM	HH:MM	HH:MM	HH:MM	£[cost]

DRIVING

Driving	Findings
Accessibility	[summary]
Safety and security	[summary]
Comfort	[summary]
Information	[summary]

NEIGHBOURING LAND USES AND LOCAL FACILITIES

[\[Description\]](#) and are shown on the map in Appendix [\[no\]](#).

Action Plan

This section sets out in detail the commitments that the developer and occupiers will deliver as part of the travel plan. These are intended to deliver the lowest practical level of car use to, from and within the development, as well as providing high quality and easy to use opportunities for alternative modes of transport. These actions will contribute directly to the achievement of modal shift outlined in the Targets and Outcomes section.

These measures have been set out according to the behaviour change framework in Somerset County Council's Manual for Travel Plans.

INFORMATIONAL MEASURES

It is important that all known information about getting to and from the development is freely available in a clear and easily readable form. For the purposes of educating users of the development, the following measures will be implemented.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date) (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
Travel Information Website	3 months prior to First Marketing of Development	Upon First Marketing of Development	Developer [name]	As long as development is occupied (funded by Management Charge)
		First Occupation	Occupiers to provide prominent links on their own websites	As long as development is occupied
Smarter Travel Information Leaflet	3 months prior to First Marketing of Development	Upon First Marketing of Development	Developer [name]	<p>Provided in print form to all potential members of staff at job advertising, recruitment and induction/commencement of work, and to all residents upon sales enquiry and occupation. To be re-provided on an annual basis.</p> <p>To be made available on Travel Information Website.</p> <p>Direct distribution by email/letter to all visitors.</p> <p>To be distributed bi-annually to local communities.</p> <p>As long as development is occupied (funded by Management Charge)</p>
Staff Travel Plan briefing	Three months prior to First Recruitment in each unit	Upon First Recruitment in each unit	Travel Plan Coordinator	<p>Provided in print form to all potential members of staff at job advertising, recruitment and induction/commencement of work, and to all residents upon sales enquiry and occupation. To be re-provided on an annual basis.</p> <p>To be made available on Travel Information Website.</p>

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date) (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
				As long as development is occupied (funded by Management Charge)
Occupier Travel Plan briefing	Upon commencement	Three months prior to Occupation of each unit	Developer [name]	To be provided to each and every change in occupier
Inclusion of travel information into mainstream development marketing literature	1 month prior to issue of each marketing product/ brochure	Upon issue of each mainstream marketing product/ brochure	Developer [name]	Upon issue of each mainstream marketing product/ brochure
Signage on-site for facilities and destinations	Prior to approval of detailed site layout	First Occupation	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Signage off-site for facilities and destinations	Prior to approval of detailed site layout	First Occupation	Developer [name]	For as long as the development is occupied
Personal travel planning	n/a	First Occupation (travel plan induction)	Travel Plan Coordinator	Monthly surgeries offering travel information advice to staff and residents
Travel Information Noticeboards external	Prior to approval of detailed site layout	First Occupation	Travel Plan Coordinator	For as long as the development is occupied (funded by Management Charge)
Travel Information Noticeboards internal	Prior to approval of detailed site layout of each unit	First Occupation of each unit	Occupiers	For as long as the development is occupied
Travel Information Relay Boards	Prior to approval of detailed site layout of each unit	First Occupation of each unit	Occupiers	For as long as the development is occupied
Newsletter	n/a	First Occupation	Travel Plan Coordinator	Three times per year following Travel Plan Network Meetings for as long as the development is occupied
Mobile travel information point	n/a	First occupation	Developer	For as long as the development is occupied
Travel information and bus journey planner contribution	n/a	Commencement of Development	Developer [name]	One-off

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date) (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
(£)				

SCC standards will be followed in the production of these measures, as contained on the Moving Forward website. Moving Forward branding will be used and logos for use by the Travel Plan Coordinator will be supplied by Somerset County Council.

The travel information website will be embedded within the main development website(s), and prominent feature box will be contained within the home page of such website(s) directing viewers towards smarter travel information.

Briefings for staff and occupiers will be prepared and disseminated highlighting the role of the travel plan, the relevance of the travel plan to them and the rewards that will be arising. The role of this is to ensure that all relevant users are fully aware of the content and obligations contained within the travel plan document prepared to support the planning application, which may otherwise be esoteric and irrelevant to them in parts.

Travel information leaflets will be distributed directly bi-annually to residential and employment units within 1km of the development in order to further offset local trips as far as it possible. Shops within the development will have a display area for local travel information and leaflets.

Electronic information boards will be provided in the reception and main offices areas with a feed to live departure board information for buses and trains, using Somerset County Council's iOnBuses software. This feed will be provided on the Travel Information Website and a direct link will be in place on all staff computer desktops.

All travel information will be updated with any changes in transport conditions within the original design framework set out at least every three months.

A travel information contribution of [£] will be provided to assist the County Council in providing relevant cycle leaflets and bus timetables to be provided by the developer as part of travel information packs ([£]/dwelling or employee)

PROMOTIONAL MEASURES

Measures to influence travel behaviour through softer measures are the most effective and best value initiatives that can be introduced. A full range of awareness-raising measures will therefore be implemented, coupled with incentives and financial rewards. This will encourage users to challenge their own travel habits and directly help deliver the aims of the travel plan.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
Residential travel vouchers	Scheme prior to Commencement	Upon First Dwelling Occupation	Developer [name]	Repeated for two further tenures in the five years following the occupation of each dwelling
One-in-five commuter competition	Scheme prior to Commencement	Upon first month anniversary of First Occupation	Travel Plan Coordinator	Monthly for as long as the development is occupied (funded by Management Charge)
Promotion of national travel awareness days	n/a	Not later than 4 weeks preceding each day	Travel Plan Representatives and Travel Plan Coordinator	Annually for each event as long as the development is occupied (funded by Management Charge)
Private group on carsharesomerset.com (£)	n/a	Upon First Marketing of Development	Travel Plan Coordinator	For as long as the development is occupied (funded by Management Charge)
Tax free cycle purchasing	n/a	Upon First Recruitment in each unit	Travel Plan Representative	To be offered continuously for as long as each unit is occupied
Repair & Ride sessions (£)	n/a	Upon First Occupation	Travel Plan Coordinator	To be provided every sixth months following First Occupation as long as development is occupied
Communications Strategy	Prior to commencement	Upon First Marketing of Development	Travel Plan Coordinator	To be updated annually

The one-in-five commuter competition will involve a monthly £50 prize draw for commuters who log at least four journeys to work by modes of transport other than by getting to work by car on their own.

Each representative of the businesses within the development will promote each and every national travel awareness day using materials provided by the Travel Plan

Coordinator. The Travel Plan Coordinator will promote these to residential communities. Moving Forward branding will be used and logos for use by the Travel Plan Coordinator will be supplied by Somerset County Council. The days promoted will include, but shall not be limited to:

- Walk to Work Week
- Walk to School Week
- National Work From Home Day
- Ride to Work Day
- World Environment Day
- Green Transport Week and Bike Week
- European Mobility Week
- Walk to School Month
- Liftshare Week
- Commute Smart Week

Guidance in the Encourage section of Somerset County Council's Manual for Travel Plans will be followed.

Communication Strategy

A communication strategy is an important part of the travel plan. This will set out which audiences will be targeted by the travel plan (segmented by mode of transport, willingness to change, age and other characteristics), the methods by which the audiences will be engaged (email, newsletters, face to face etc.), the frequency of engagement and any other elements that need to be planned for effective communication.

A template consisting of the following headings will be followed in the production of the Communications Strategy.

- Themes for engagement – areas of interest that would appeal to the target audiences (e.g. motivations for change, such as environment, cost savings, health or social rewards, ease of travel etc.)
- Points of engagement with employers and employees – from initial engagement to changed travel choices (initial launch of and introduction to travel plan; communication of rewards; provision of information about travel alternatives; ongoing support, encouragement and promotion, and maintenance of changed choices)
- Target audiences – employers, employees, visitors, local people, other organisations outside of the travel plan zone, and waves of engagement (e.g. first, second etc.)
- Management roles – communication between HR, facilities management, property/estates management, fleet management, environmental management, marketing, supplies management and logistics, IT services.
- Analysis of travel plan population and break down of proportion that fit into different target audiences (needs to be done following occupation and analysis of employers and employees)
- Key messages
- Summary of travel plan and events including meetings

- Branding guidelines including logos and templates for emails, newsletters and all forms of written/printed communications
- Schedule of internal and external staff, departmental and employer network meetings including agenda and minutes preparation and circulation
- Notification timescales for specific activities (e.g. Repair and Ride, transport promotion days) and administration (opening, closing, reporting) of surveys
- Schedule for promotion of general resources such as website information and press releases
- Set-up and maintenance schedules for information resources (including periodic maintenance of websites and social networks such as Facebook, Twitter, online groups/forums and blogs where applicable)

The principal aim is to provide a structured approach to changing travel behaviour, in combination with the targeted measures.

DESIGN OF THE DEVELOPMENT

To further enhance the appeal of walking and cycling within the development a full and continuous network of cycleways and footways will be provided within the development which promote such movements over the use of the car. An on-site speed limit of 10mph will be implemented for cars and traffic will be calmed to provide a relaxed environment conducive to walking and cycling and welcoming for these modes.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
Showers, changing rooms, drying rooms and lockers	Prior to approval of detailed site layout for each unit	First Occupation of each unit	Developer [name]	For as long as the development is occupied

Showers and accompanying facilities will be provided according to the standards set out in Somerset County Council's Draft SPD Enabling Smarter Travel through Travel Planning and BREEAM standards.

PARKING MEASURES

A full range of parking solutions will be implemented within the development. These will be within the limits set out in Somerset County Council's parking standards for new development, and will be adjusted within these limits to provide a level of parking appropriate to and which equals the modal split targets that need to be achieved. The availability of parking spaces will enforce the desired travel characteristics for the development.

The quality and design of cycle, motorcycle and car parking spaces will be determined by this travel plan.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by	Person(s) responsible	Duration/period of repetition
Car sharing spaces	Prior to approval of detailed site layout	First Occupation of each unit	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Low carbon and electric vehicle parking	Prior to approval of detailed site layout	First Occupation of each unit	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Fully enclosed cycle parking spaces for staff	Prior to approval of detailed site layout	First Occupation of each unit	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Covered cycle parking spaces for visitors	Prior to approval of detailed site layout	First Occupation of each unit	Developer [name]	For as long as the development is occupied (funded by Management Charge)
On-street cycle parking spaces for visitors	Prior to approval of detailed site layout	First Occupation of each phase	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Covered motorcycle spaces	Prior to approval of detailed site layout	First Occupation of each unit	Developer [name]	For as long as the development is occupied (funded by Management Charge)
Seating on-street	Prior to approval of detailed site layout	First Occupation of each phase	Developer [name]	For as long as the development is occupied (funded by Management Charge)

Cycle, motorcycle and car share parking:

Cycle parking will be implemented according to the standards set out in Somerset County Council's Draft SPD Enabling Smarter Travel through Travel Planning including quality of provision and signage.

Car parking:

A strict parking regime will be implemented and applied to all staff cars within the development. No employees working within the development that live within 2 miles

of the development or within 1km of a bus route serving the development will be permitted to park on-site. All such employees will be paid the equivalent of £1 per day as a car parking cash out to reflect the rewards to the employer of not having to provide and maintain parking spaces.

All remaining car parking spaces will be provided according to a car parking eligibility criteria that promotes car sharing, public transport use and the use of low carbon vehicles. Criteria for allocating spaces will be delivered in accordance with Manual for Travel Plans. All users will be charged £1 per day for car parking.

All on-street parking will be controlled via TRO where on public highway or via the Management Company where on private estate roads. No car parking will be permitted in non-designated spaces and warnings and fines will be issued in the event of non-compliance.

Employers will share car parking areas and access to these car parking areas will be controlled by windscreen permits issued on a daily basis by machines within the car parks. Each eligible car user will be provided with a swipe card allowing them to use these machines. Charges of £1 per visit will apply for visitor parking which will be recycled into the car parking management costs.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by	Person(s) responsible	Duration/period of repetition
Car parking permitting scheme	Prior to Commencement	First Occupation	Developer [name]	As long as development is occupied

MANAGEMENT MEASURES

The travel plan will not be successful without a full time member of staff to ensure that the actions within the travel plan are implemented and that the targets are met. For this reason a full time person devoted to the role of travel plan coordinator will be funded by the developer for a period of ten years [£]. Following this period, a management levy will be applied to all occupiers to ensure the continuity of this human resource and funding for the travel plan in perpetuity. The person appointed will at all times be qualified according to the training provided by ACTTravelwise.

These measures will exemplify commitment towards the travel plan through the provision of human and financial resources dedicated to the delivery of the travel plan.

Each occupier will set aside a travel plan budget of £500 (or at least £50 per staff member, whichever is the greater) per annum to contribute towards the post-occupation initiatives set out within this travel plan.

Funding for the initiatives in this travel plan shall not be a limiting factor in their provision.

A Travel Plan Management Fund will be managed by the Travel Plan Coordinator using management fees. A residential travel plan management fund of [£] will be provided.

Each occupier will appoint a travel plan representative who will be responsible for implementing those aspects of the travel plan that can be delivered in house. In-house measures will be funded by individual occupiers.

Each occupier will be required to attend a meeting of all occupiers and the Travel Plan Coordinator on a four-monthly basis. Such meetings will be hosted by the occupiers themselves in rotation.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by	Person(s) responsible	Duration/period of repetition
Travel Plan Coordinator	Job description prior to Commencement	In place 3 months following Commencement	Developer [name]	As long as development is occupied
Travel Plan Representatives	n/a	In place 3 months prior to First Occupation of Each Unit	Developer [name]	As long as development is occupied
Travel Plan Budget	Prior to commencement	Commencement	Developer [name] (travel plan management fund) Occupiers (in house measures)	As long as development is occupied
Partnership working with local employers/area-	n/a	First Occupation	Travel Plan Coordinator and Travel Plan	Travel Plan Network Meetings three times per

Measure to be implemented	Submitted to and approved by County Council by	Implemented by	Person(s) responsible	Duration/period of repetition
wide travel planning			Representatives	year
Travel Plan Charter	n/a	Signed prior to First Occupation	Developer(s) [name] and Travel Plan Representatives	To be signed by each and every change in occupier
Flexible working policies	Three months prior to the occupation of each unit	Upon occupation of each unit	Travel Plan Representatives	As long as each unit is occupied To be updated as required and at least annually within approved framework
Videoconferencing facilities	Prior to approval of detailed site layout	80% Completion of development	Developer [name]	As long as each unit is occupied
Pool bikes	Prior to Commencement	Upon occupation of each unit	Occupiers	As long as each unit is occupied
Cycle spares and equipment store	Prior to Commencement	Upon occupation of each unit	Occupiers	As long as each unit is occupied
Cycle equipment	Prior to Commencement	Upon occupation of each unit	Occupiers	As long as each unit is occupied

All staff will be offered the opportunities to travel off-peak to reduce traffic demand and accommodate journeys by non-car means. This will be accompanied by post-geographic working to allow employees to work from home or to go directly to meetings without first calling at work. These policies will be enshrined within a business travel policies dossier for each unit. The travel plan coordinator will provide a template for travel plan representatives to complete.

Pool bikes for staff to use for local journeys will be provided at a ratio of one bike to every 20 staff members. Each unit will provide and maintain a basic store of equipment for cyclists to use in emergencies such as spare lights, batteries, bicycle pump, fluorescent clothing and umbrellas. Each member of staff will be able to apply to the Travel Plan Coordinator for a free high grade cycle lock and fluorescent weather proof jacket to loan for their journeys to work.

A shared videoconferencing hub will be provided within the development.

OFF-SITE TRANSPORT IMPROVEMENTS

The site audit identified a number of physical deficiencies in the existing transport network. These deficiencies will prevent the anticipated travel flows across all modes occurring unless they are addressed. Hence the developer will fund the following improvements to enable the anticipated travel choices to be attained.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by	Person(s) responsible	Duration/period of repetition
Bus priority measures on [road name]	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity
Cycle infrastructure improvements on [road name]	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity
Cycle linkages to everyday activity destinations within 2km of the development boundary	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity
Footway improvements within 2km of the development boundary	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity
Bus shelters within 1km of the development boundary	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity
Footways and cycleways on-site	Prior to approval of detailed site layout	First Occupation	Developer [name]	In perpetuity

Any licensing and maintenance/management arrangements will be agreed in advance of implementation and commuted sums will be provided for off-site infrastructure works.

Bus services:

All bus stops within 1km of the boundary of the development site will be upgraded to include high quality bus stops that include shelters, raised kerbing, travel information (timetable cases and flags with laminates detailing services, name of stop, direction of travel and development website), seating and cycle parking.

A development specific bus stop will be implemented directly adjacent to the entrance of the development on each side of the road on the [\[road name\]](#).

Walking:

Footways within 2km between the development and everyday activity destinations within 2km of the development will be of at least 1.5m in width.

Footway and cycleway provision will be made within each plot for access between the plot entrance and the relevant parking area which provides priority for pedestrians and cyclist through car parks and other shared spaces.

Signage from the entrance of the development to the everyday activity destinations identified in the informational measures will be provided for cyclists and walkers. Signage off-site will be provided.

A crossing point will be implemented immediately outside the development to allow bus users and walkers easy access [across the \[road name\]](#).

Cycling:

Cycleways of at least 2m width will be provided between the development and everyday activity destinations within 2km of the development.

Within the development high quality, well designed and continuous off-road cycleways will be provided along both sides of the main estate roads which give priority to cycle movements.

Dedicated footway and cycleway entrances will be provided at the points marked [\[points\]](#) on [\[plan number\]](#). These will be at least 3m wide and include off-site improvements to ensure they form a continuous link between the internal design of the development and existing footway/cycleway networks outside of the development.

Targets and Outcomes

Modal share targets are crucial to driving the success of the travel plan. The developer and occupiers commit to delivering these targets, implementing further measures to those set out if it becomes apparent through modal split monitoring that the targets put forward are not being met.

A fund of £[] is provided within the s106 agreement for Safeguard measures should these development-wide targets be missed.

All occupiers will be expected to comply with these targets on a unit-by-unit basis.

Occupiers will fund their own additional initiatives and will each have a travel plan budget put aside for the purposes of implementing the travel plan and additional measures should either unit-specific or development-wide targets (or both) not be met.

The safeguard measures to be implemented will be chosen from those listed in Somerset County Council's Draft SPD Enabling Smarter Travel through Travel Planning. SCC's Guidance on Avoiding the Activation of Safeguards will be used to ensure that targets are met wherever possible rather than the Safeguard measures needing to be implemented.

A formula-based target will be used to draw down funding from an Escrow account set up by the developer. Somerset County Council will determine how much money is to be drawn down on an annual basis according to this formula.

T = target split (SOV)

A = actual modal split (SOV) (average of survey and count data)

H = 100% modal split (SOV)

M = midpoint between T and H

E = exceedence

S = total safeguard sum (£)

Safeguard sum to be drawn down = $[(A-T)/(H-T)] \times (S \times 2)$

A record of all measures implemented will be kept for inspection on demand for Somerset County Council, including soft measures relating to recruitment etc. prior to occupation. A standard range of default clauses will be put into place in the s106 agreement to cover the provision of measures in the event of defaults by the developer/owners or occupiers, including the use of bonds and issuance of Travel Plan Notices.

On an annual basis, the Travel Plan Coordinator will conduct a survey of all those working within and visiting the development, to ascertain travel patterns and collect feedback to aid the development of the travel patterns. These surveys will use Somerset County Council's standard survey forms to ensure data on modal split is collected in a fair and consistent manner.

Modal share targets - staff (%):

[Insert percentages into table below]

	Year 1	Year 2	Year 3	Year 4	Year 5
--	--------	--------	--------	--------	--------

Car alone					
Car sharing					
Cycling					
Public bus					
Shuttle bus					
Walking					
Motorcycle small					
Motorcycle large					
Working from home					
Park and Ride					

Modal share targets - visitors (%):

[\[Insert percentages into table below\]](#)

	Year 1	Year 2	Year 3	Year 4	Year 5
Car alone					
Car sharing					
Cycling					
Public bus					
Shuttle bus					
Walking					
Motorcycle small					
Motorcycle large					
Working from home					
Park and Ride					

Equivalent number of total arrivals per day:

The following figures relate to the targets above and are provided for the purposes of automatic traffic counting.

[\[Insert figures into table below\]](#)

	Year 1	Year 2	Year 3	Year 4	Year 5
Car (total)					
Car alone					
Car sharing					
Cycling					
Public bus					
Shuttle bus					
Walking					
Motorcycle small					
Motorcycle large					
Working from home					
Park and					

Ride					
Total					

All questionnaire surveys will achieve a minimum 40% response rate, otherwise the survey will be repeated or further responses sought. SCC's advice contained in Manual for Travel Plans will be used to ensure that the survey manages this level of response (e.g. p13). This will be accompanied by a report using SCC's standard annual report template.

A true record of modal split will be achieved by averaging the questionnaire and counted data. This will be the data recorded on iOnTRAVEL.

The Travel Plan Coordinator will use Somerset County Council's online monitoring system, iOnTRAVEL, to report on all aspects of the implementation of the travel plan as required by the website's online monitoring system.

Occupiers will provide data on the number of Heads of Staff in order to work out modal split.

Measure to be implemented	Submitted to and approved by County Council by	Implemented by date (i.e. approval by date)	Person(s) responsible	Duration/period of repetition
Automatic traffic and cycle counters	Prior to approval of detailed site layout	First occupation	Developer [name]	As long as development is occupied
Questionnaire staff surveys	n/a	First anniversary of First Occupation	Travel Plan Representatives	Annually as long as development is occupied
Visitor sign-in surveys	n/a	First anniversary of First Occupation	Travel Plan Representatives	One week per year annually as long as development is occupied
Reporting	4 weeks following first anniversary of First Occupation	n/a	Travel Plan Coordinator	Annually as long as development is occupied
Submission of Safeguard plans	4 weeks following first anniversary of First Occupation	Upon 8 weeks following first anniversary of First Occupation	Travel Plan Coordinator	Annually as long as development is occupied
Bonds	Prior to Commencement	Upon commencement	Developer [name]	Until completion of obligations
Safeguard sum	Prior to Commencement	Upon commencement	Developer [name]	Until completion of obligations
Travel Plan Fee	n/a	Paid upon commencement	Developer [name]	One-off fee
Implementation Record	n/a	Upon commencement	Developer [name] and Occupiers	As long as development is occupied
Entering of information onto iOnTRAVEL	Prior to Commencement	Upon commencement	Developer [name]	As long as development is occupied

References

Somerset County Council (2008) Manual for Travel Plans

Appendices

Moving Forward Cycle Map 2nd Edition

Strategic map showing location of site in Somerset

Neighbourhood map with all off-site transport links and proposed walk and cycle desire lines to the development

Polar plot

Examples of planned information provision (leaflets, etc.)

Detailed site plan with all physical measures marked on*

Cycle and motorcycle parking technical specifications/drawings*

* = Detailed drawings to be provided at reserved matters for outline applications

Appendix 7

Annual Report Template

Travel Plan Annual Report Template

You must submit a report within three months of carrying out your annual travel plan monitoring survey.

- This document provides the template to base your submission around.
- **Please note this report is automatically generated for developers using the iOnTRAVEL surveys software.**

Question 1: Please give the name and location of your employer.

✍ You should give the company names and locations.

Question 2: How many days a week do you usually work?

✍ This information must be aggregated across all responses and entered onto the spreadsheet available on the Moving Forward website - <http://www.movingsomersetforward.co.uk/new-developments/travel-plan-resource-centre/travel-analysis>

Question 3: Where do you travel to work from?

✍ You should summarise the home locations of those surveyed, by numbers and percentages living in towns/villages and/or or postcode areas.

Question 4a: What is your main mode of transport for getting to work (the one you use most often, for the longest part of your journey by distance)?

✍ You should summarise the main method of transport of those surveyed, by numbers and percentages:

- | | |
|---|---|
| <ul style="list-style-type: none">• Bus• Car alone• Car with Other Person(s)• Cycling• Motorcycling (125cc and under)• Motorcycling (over 125cc)• Park and Ride | <ul style="list-style-type: none">• Shuttle/Employer Bus• Train• Walking• Work at Home• Work Off Site without Calling at Work• Other |
|---|---|

Question 4b: How often do you use the following methods of travel to get to your regular place of work?

✍ This information must be aggregated across all responses and entered onto the spreadsheet available on the Moving Forward website - <http://www.movingsomersetforward.co.uk/new-developments/travel-plan-resource-centre/travel-analysis>

Question 5: Can you suggest any other changes that would help you to avoid travelling by car, e.g. facilities, routes, services, equipment?

✍ You should summarise the responses of those surveyed.

Question 6: If you have recently changed your travel habits, please give the one reason why.

✍ You should summarise the responses of those surveyed, by numbers and percentages responding:

- | | |
|---|---|
| <ul style="list-style-type: none">• Congestion/time spent travelling• Cost – parking• Cost – fuel• Crime/vandalism• Environmental Motivation• Family / Caring Responsibilities• Healthy Living / Exercise | <ul style="list-style-type: none">• Mobility Problems• New Job• New Transport Service / Route• Obtained Driving Licence• Parking availability• Weather• Other |
|---|---|


Question 7: Would you like to receive feedback on the results of this survey?

✍ You should provide a copy of the results to those requesting them to maintain interest in and generate understanding of the travel plan.

Question 8: Please enter your email address if you would like to be added to the mailing list to receive further travel related information from the Moving Somerset Forward campaign or via your employer.

✍ You should provide a copy of the email addresses to Somerset County Council.

RESIDENTIAL TRAVEL PLANS

 Please provide the addresses, claimant names and amounts of all those households a) provided with a voucher, b) claiming expenditure, and c) reimbursed against expenditure as permitted expenditure under the Green Travel Voucher scheme in the previous 12 months since the last annual report.

Households	Voucher provision	Expenditure claim	Reimbursement amount
[Name and address]	[amount] [date]	[amount] [date]	[amount] [date]

Appendix 8

Draft Standard s106 Schedule

SCC DRAFT Standard Section 106 schedule – travel plans

Please note this is a continually evolving document. You are advised to contact SCC for an up-to-date template agreement prior to embarking on the drafting of your travel plan schedule.

SCHEDULE X

APPROVAL, IMPLEMENTATION AND MONITORING OF RESIDENTIAL/WORKPLACE TRAVEL PLAN

Key

Residential developments only

Workplace developments only

Generic to all developments

Part 1: Definitions

<i>Term</i>	<i>Definition</i>
Action Plan	A timetable and specification for new initiatives to improve travel options for staff, customers and visitors which shall include and not be limited to measures relating to the physical design and infrastructure in and around the development and shall include a full range of measures decided with reference to Manual for Travel Plans and recorded on iOnTRAVEL
Approval and Preparation of the Travel Plan	Stages in the development of the travel plan as defined within iOnTRAVEL as follows: 'Approval' refers to the acceptance of the Travel Plan document. 'Preparation' refers to the entry of the Site Synopsis, Targets, and Actions on iOnTRAVEL, which follows the acceptance of the Travel Plan document.
Approved Travel Plan	Document submitted to and accepted by Somerset County Council, which for the purposes of monitoring and enforcing the travel plan is formally detailed in the Contents of the Travel Plan as submitted and approved on iOnTRAVEL.
Automatic Reminder System	System on iOnTRAVEL reminding developers of their commitments which refer to the approval,

	preparation and operation of their travel plan.
Automatic Traffic Counters	Permanently-installed equipment for the monitoring of vehicle flows/person movements.
Completion of Actions	The approval by SCC of completed actions submitted by the developer. This process is carried out using iOnTRAVEL.
Contents of the Travel Plan	The 'Site Synopsis', 'Targets & Outcomes', and 'Action Plan' as contained within iOnTRAVEL and derived directly from the Approved Travel Plan.
Entering of Survey Data	The submission by the developer of survey data according to the Monitoring Strategy in the Approved Travel Plan. This process is carried out using iOnTRAVEL.
Green Travel Voucher	A voucher system allowing householders to be reimbursed against expenditure in the furtherance of smarter travel choices.
iOnTRAVEL	A website for recording the preparation and implementation of travel plans in Somerset, or any other additional or replacement system used by Somerset County Council in pursuit of monitoring travel plans as nominated in the sole discretion of the County Council.
Manual for Travel Plans	Somerset County Council's travel plan guidance documents as dated December 2008 or as subsequently updated and as otherwise supported by material contained on www.movingsomersetforward.co.uk and any other website used by Somerset County Council in pursuit of providing County Council travel planning guidance.
Members of the Community	Residents, employees, employers, members of the public and other stakeholders in and around the development including customers, visitors and voluntary groups
Modal Share Targets	Quantified figures for the proportion of trips carried out by the 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, expressed as percentages and as recorded on iOnTRAVEL.
Modes of Travel	Car On Their Own; Public Bus; Shuttle Bus; Car With Other Person(s); Cycling; Motorcycling (125cc and under); Motorcycling (over 125cc); Park and Ride; Train; Walking; Work at Home; Work Off Site Without Calling at Work
Monitoring Strategy	A methodology and schedule for monitoring all travel to, from and within the development site for all Modes of Travel by staff, customers and

	visitors as set out in the Approved Travel Plan.
Personal Travel Planning	A personalised travel planning advice service consisting of individualised face-to-face marketing or using other direct means to influence the travel behaviour of Members of the Community.
Registration Process	The process of submitting name and contact details on iOnTRAVEL in order to set up, view and/or manage a travel plan.
Schedule of Travel Plan Fees	A standard set of fees payable to Somerset County Council for its role (in respect of the SCC Travel Plan Coordinator) in advising on the development and reviewing the implementation of the Approved Travel Plan.
Site Audit Report	Information about all existing travel opportunities to, from and within the development site for all Modes of Travel as set out in the Approved Travel Plan
Site Synopsis	Background information about the development as entered into and approved on iOnTRAVEL, which refers to the location, planning history and phasing of the development; timings for the delivery of the development; the size of the development; travel movements and dates for the approval of the Contents of the Travel Plan.
Site Travel Plan Coordinator	A nominated human resource to assist with the management, coordination and implementation of the Approved Travel Plan and Contents of the Travel Plan
Site-Specific Travel Information leaflet	A leaflet directed at Members of the Community produced (designed and printed) to a standard acceptable to Somerset County Council displaying in an engaging form travel options and information for all Modes of Travel
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 Somerset County Council containing travel options and information for all Modes of Travel
Smarter Travel Policy Dossier	A folder or document contain business travel policies including the following information submitted to and approved by Somerset County Council: 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, fl exible/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; On-site cycle repair sessions; Corporate car loan for work trips; Reimbursement rates for all Modes of Travel.
Somerset County Council's Travel Plan Coordinator	Officer employed by Somerset County Council to advise on the preparation and review the implementation of travel plans
Statement of Travel Plan Approval	Communication in writing by Somerset County Council's Travel Plan Coordinator to confirm the acceptance of the Approved Travel Plan and the Approval and Preparation of the Travel Plan on iOnTRAVEL
Statement of Travel Plan Compliance	Communication in writing by Somerset County Council's Travel Plan Coordinator to confirm the implementation of the Contents of the Travel Plan as recorded on iOnTRAVEL
Tables of Measures	An short schedule of measures aimed at particular land-uses within a development and forming part of the Action Plan for the Approved Travel Plan
Targets & Outcomes	Modal Share Targets and reported survey data as recorded on iOnTRAVEL
Traffic-Generating Unit	Any building or land-use within the development from which trips by any of the Modes of Travel begin or terminate
Travel Information Noticeboards	Noticeboards located internally and externally for the sole purpose of providing travel information for all Modes of Travel to a minimum dimension of 1.5m x 1.5m to a specification submitted to and approved by Somerset County Council's Travel Plan Coordinator prior their construction
Travel Plan	General term referring to a management framework for a site to reduce or otherwise minimise car journeys to and from the development by encouraging the use of Modes of Travel other than the solo-occupancy car
Travel Plan Fee	A fee payable to Somerset County Council for its role (in respect of the SCC Travel Plan Coordinator) in advising on the development and reviewing the implementation of the Approved Travel Plan as set out in the Schedule of Travel Plan Fees
Travel Plan Notice	Communication in writing by Somerset County Council or the Local Planning Authority to inform the developer of a breach in the implementation of the Contents of the Travel Plan as recorded on iOnTRAVEL
Travel Website	A series of internet pages prepared to reflect the opportunities to, from and within the site for all

	Modes of Travel and submitted to and approved by Somerset County Council's Travel Plan Coordinator
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Part 2: Covenants by the Developer

Approval of Travel Plan

The developer covenants with the County Council:

- i) As soon as is reasonably practical prior to the commencement of the development to submit a Travel Plan in relation to the development to Somerset County Council's Travel Plan Coordinator
- ii) Not to commence construction or permit the commencement of construction of any part of the development until and unless a Travel Plan prepared in accordance with the County Council's 'Manual for Travel Plans' guidance dated December 2008 and appended at Schedule X of this deed is approved by issue of a Statement of Travel Plan Approval in writing by the County Council
- iii) For the avoidance of any doubt pursuant to the above and without prejudice to the detail of the Travel Plan or the County Council's guidance to include in the Travel Plan the following:
 - 1. 'Site Audit Report', providing information about all existing travel opportunities to, from and within the development site for all Modes of Travel
 - 2. 'Action Plan' of new initiatives to improve travel options for staff, customers and visitors which shall include and not be limited to measures relating to the physical design and infrastructure in and around the development
 - 3. 'Monitoring Strategy' providing a methodology and schedule for monitoring all travel to, from and within the development site for all Modes of Travel by staff, customers and visitors
- iv) To enter or arrange have entered at their own cost by a third party and approved by the County Council in writing as part of the Statement of Travel Plan Approval a 'Site Synopsis', 'Targets & Outcomes', and 'Action Plan' on the County Council's Monitoring Tool for Travel Plans 'iOnTRAVEL' and to append by way of reference such elements as a true and agreed record of the Contents of the Travel Plan as a Appendix to the Approved Travel Plan
- v) Not to commence construction or permit the commencement of construction of any part of the development until and unless data relating to the Approval and Preparation of the Travel Plan has been entered onto iOnTRAVEL and approved by Somerset County Council pursuant to the above

- vi) Pay a Travel Plan Fee of [£700/£2000/£3000] before commencement of the development by cheque to Somerset County Council to cover the County Council's costs in reviewing the implementation and operation of the Travel Plan as set out in Somerset County Council's Schedule of Travel Plan Fees dated June 2009
- vii) Not to commence construction or permit the commencement of construction of any part of the development until and unless a Travel Plan Fee has been paid pursuant to the above
- viii) Pay [an Escrow Sum/Bond/Deposit/Other Secured Amount/Contribution of Sum] to Somerset County Council in the following instalments (index linked) for the sole purposes of implementing the Travel Plan as set out below unless otherwise agreed in writing by the issue of a Variation of Terms by the County Council in their sole discretion and without prejudice to the implementation of Travel Plan Notices:
 - 1. [e.g. £68,244] [e.g. personal travel planning]
 - 2. [amount] [timetable]
- ix) Not to commence construction or cause or permit any further occupation of any part of the development until and unless any part of the [an Escrow Sum/Bond/Deposit/Other Secured Amount/Contribution of Sum] payable pursuant to the above timetable has been paid in full to the County Council

Implementation of Travel Plan

The developer covenants with the County Council:

- i) To take all steps necessary to implement and comply with the Content of the Travel Plan at all times and at least until the issue of a Statement of Travel Plan Compliance in writing by Somerset County Council which without prejudice to the Content of the Travel Plan shall include the implementation of measures and the achievement of Modal Share Targets
- ii) For the avoidance of doubt pursuant to the above and without prejudice to the detail of the Content of the Travel Plan the measures to be implemented at the cost of the developer shall include:

Travel Plan Measure	Timescale for Introduction of Measure
Site Travel Plan Coordinator	Prior to commencement on the basis of [1 day's employment per week] and continuously until five years following the first occupation of the final

Travel Plan Measure	Timescale for Introduction of Measure
	Traffic-Generating Unit
Green Travel Voucher	£300 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 expenditure incurred in adopting sustainable travel patterns provided that expenditure is limited to that defined by Appendix X to the Travel Plan
Smarter Travel Information Pack	A folder of leaflets and promotional literature to include a Site-Specific Travel Information leaflet including information about all Modes of Travel and highlighting the Green Travel Voucher prepared at the Developer's expense to a professional standard as approved by Somerset County Council prior to its distribution and distributed to all Traffic-Generating Units from the first occupation of each unit within 5 years of the first occupation of each unit and made available on demand from the Site Travel Plan Coordinator and placed on the Travel Website and Travel Information Noticeboards
Cycle Parking	Dedicated fixtures and fixed covering structures for a number of cycles matching the number of bedrooms for dwellings and in any event in accordance with or greater than the minimum cycle parking standards for other types of land-use to a specification and location submitted to and approved by

Travel Plan Measure	Timescale for Introduction of Measure
	Somerst County Council's Travel Plan Coordinator prior to the auditing and approval of and included explicitly in any drawings an plans relating to the layout and physical structure of the development
Showers	To provide showers for employees at a ratio of at least 1 shower and changing unit per XXXX GFA
Motorcycle Parking	Dedicated fixtures and fixed covering structures for a number of motorcycles in any event in accordance with or greater than half the minimum cycle parking standards or at a ratio of 1:10 in relation to car parking for all types of land-use to a specification and location submitted to and approved by Somerset County Council's Travel Plan Coordinator prior to the auditing and approval of and included explicitly in any drawings an plans relating to the layout and physical structure of the development
Electric Vehicle Charging	At the construction and in any event prior to the occupation of each unit to provide a live outdoor electrical plug socket proximal to areas of car parking within the curtilage of units to provide for the charging of electrically-powered vehicles
Employment Car Sharer Parking	At the construction and in any event prior to the occupation of each unit provide signed and marked parking spaces for car sharers at a ratio standards or at a ratio of not less than 1:10 in relation to the total amount of car parking at a location submitted to and approved by Somerset County Council's Travel Plan Coordinator prior to the auditing and approval of and to be included explicitly in

Travel Plan Measure	Timescale for Introduction of Measure
	any drawings relating to the layout and physical structure of the development
Travel Website	A series of internet pages prepared at the developer's expense to reflect the opportunities to, from and within the site for all Modes of Travel and submitted to and approved by Somerset County Council'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
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 to a minimum dimension of 1.5m x 1.5m to a specification submitted to and approved by Somerset County Council's Travel Plan Coordinator prior to 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
Pedestrian and Cycle Route Signage	Prior to the first occupation of the development at reviewed within 3 months of said date and added to where Somerset County Council's Travel Plan Coordinator deems necessary in its sole discretion
Promotional Activity	On at least an annual basis commencing on the first anniversary of the first occupation of any part of the site conduct a day-long on-street event, fair or other occasion manned by the Site

Travel Plan Measure	Timescale for Introduction of Measure
	Travel Plan Coordinator to promote the Travel Plan and the Modes of Travel contained within it advertised to all Members of the Community not less than three weeks in advance of said event and to which all Members of the Community are invited between the hours of not later than 8am start time and not earlier than 6pm end time
Personal Travel Planning	Mid-way through occupation funded by the s106 and carried out by agents appointed by Somerset County Council
Tables of Measures	To be approved by Somerset County Council within 6 months from the first occupation of each employment or other non-residential Traffic-Generating Unit

- i) Pursuant to the implementation of Table X above to prior to the first occupation of any and every dwelling and within fifteen months of any subsequent change of tenure for any and every dwelling pursuant to the above procure that each occupying household is provided with a Green Travel Voucher provided that for the avoidance of doubt the developer shall be required to provide Green Travel Vouchers for not more than three changes in household for each dwelling and not more than [number] Green Travel Vouchers in aggregate
- ii) Not to permit any further occupation of the development until any householders not financially reimbursed for their expenditure pursuant to Green Travel Vouchers within 15 months of their reasonable request being made to the Site Travel Plan Coordinator have been reimbursed
- iii) Pursuant to the implementation of Table X above to within fifteen months of any subsequent change of tenure for any and every dwelling pursuant to the above procure that each occupying household is provided with a Smarter Travel Information Pack provided that for the avoidance of doubt the developer shall be required to provide Smarter Travel Information Packs for not more than three changes in household for each dwelling and not more than [number] Smarter Travel Information Packs in aggregate
- iv) Not to permit the first occupation unless the intending occupying household/occupier has been provided with a Smarter Travel Information Pack

- v) Within 12 months of the first occupation of the first dwelling and within the same calendar month in the next years until five years after the first occupation of the final dwelling to report in writing to Somerset County Council on:
 - 1. The number of Smarter Travel Information Packs and Green Travel Vouchers provided pursuant to paragraph X
 - 2. The names and addresses of [households/occupiers] provided with a Smarter Travel Information Pack and Green Travel Voucher
- vi) To keep accurate records pursuant to the implementation of Smarter Travel Information Packs and Green Travel Vouchers in the event of any dispute with residents or the County Council
- vii) Pursuant to the implementation of Table X above to fund the employment of a Site Travel Plan Coordinator to assist with the management, coordination and implementation of the Travel Plan provided that for the benefit of doubt the sole responsibility for implementing the Content of the Travel Plan lies with the developer
- viii) To procure the submission of a Smarter Travel Policy Dossier and Table of Measures for each employment unit within 3 months of the first occupation of each unit and to have approved by Somerset County Council and inserted into an updated Travel Plan Document a Table of Measures for each specific unit in the development within 6 months of occupation
- ix) Within 12 months of the first occupation of the first employment unit and within the same calendar month in the next years until five years after the first occupation of the final employment unit to report in writing to Somerset County Council on:
 - 1. The name and contact details of a travel plan representative for all employers operating in the development to include name, full address including post code and email address
- x) To convene a meeting of at least annually of all employers in the development to discuss the Travel Plan, and to provide a full set of minutes for these meetings to Somerset County Council to include specific action points within 6 weeks of said meetings taking place
- xi) To monitor the travel plan in accordance with the schedule ('Action Plan') and meet targets for single-occupancy vehicle use ('Targets and Outcomes') set out in Somerset County Council's travel plan monitoring tool (iOnTRAVEL). The developer/owner shall use a methodology set out within the Approved Travel Plan which shall include how the data will be collected. The developer owner shall, in all cases, collect data in a standardised format as pre-determined with Somerset County Council that shall for the avoidance of doubt include collecting data on Modes of Travel used for the journey to work and use appropriate incentives to achieve at least a 40% response rate. The developer/owner shall maintain contact with Somerset County Council via the online tool (iOnTRAVEL), and shall update it with survey data as surveys are deemed to be implemented and otherwise as required by the Automatic Reminder System.

- i) To procure the inclusion in any tenant's lease or licence of any part or parts of the development a covenant that the tenant or licensee will implement the Travel Plan in respect of such part or parts of the development and to use all reasonable endeavours to enforce such obligations against such tenant or licensee occupier
- ii) To ensure that all potential purchasers, tenants and successors in title are made aware of any agreements entered into by the developer or their agents in pursuit of the Travel Plan
- iii) Not to commence construction or cause or permit any further occupation of any part of the development until and unless any part of the Content of the Travel Plan that is considered overdue is implemented and approved without prejudice to the issuing of Travel Plan Notice as set out below

Monitoring Operation of Travel Plan

The developer covenants with the County Council:

- i) To inform the County Council's Travel Plan Coordinator at all times by way of entering such information into iOnTRAVEL the following Actual Milestone Dates within 10 days following such dates occurring:
 - i) Commencement of construction on the site and of each phase
 - ii) Commencement of the first occupation on the site and of each phase
 - iii) Commencement of the final occupation on the site and of each phase
- iv) To inform the County Council's Travel Plan Coordinator within 10 days following the letting of the Site or any part or parts thereof of the following details:
 - 1. Name and address of the tenant;
 - 2. Description of the premises demised;
 - 3. Length of the term; and
 - 4. A sufficient extract of the Lease setting out the terms of the covenant expressed in favour of the County Council in relation to the Travel Plan
- v) To inform the County Council's Travel Plan Coordinator within 10 days following such dates occurring if at any time changes in the Organisational Framework of the travel plan occur including the nomination of the Site Travel Plan Coordinator by entering such information into iOnTRAVEL and complying with the Registration Process set out therein
- vi) To enter onto iOnTRAVEL at their own cost and have approved by Somerset County Council any information necessary according to the on iOnTRAVEL Automatic Reminder System which shall

- include without prejudice to the Automatic Reminder System the Completion of Actions and Entering of Survey Data
- vii) To use a methodology of survey data collection as set out within the Approved Travel Plan in all cases at their own cost in a standardised format agreed with Somerset County Council
- viii) To install [number] Automatic Traffic Counters at entrances to the development prior to any occupation of any part of the site at locations to be agreed with Somerset County Council prior to the construction of any part of the site
- ix) Pursuant to the implementation of ATCs above to fund the application, advertising, public consultation and implementation of related TROs
- x) That if in the reasonable opinion of the County Council the Developer fails to implement and/or comply with any and/or all of the Content of Travel Plan the County Council shall be entitled to serve a Travel Plan Notice and have the right to all/any monies remaining in the [Escrow Account/Bond/Deposit] save for the sum required to pay any outstanding financial administration fees to implement:
 - i) Measures to remedy the failure specified in the Travel Plan Notice; and/or
 - ii) Alternative measures as the County Council acting reasonably determines to remedy the failure specified in the Travel Plan Notice to achieve similar mitigation effect; and/or
 - iii) The cost of taking enforcement action
- xi) Pursuant to the above such Travel Plan Notice shall include:
 - i) Limitations on the occupation/further occupation and use of the site; and/or
 - ii) A requirement for the developer/owner to meet with Somerset County Council to discuss further measures within 28 days of the said Travel Plan Notice
- xii) Pursuant to the above the County Council and its agents and contractors shall have the right to enter the development and use any methods available at its disposal and take corrective actions in pursuit of the above the remedy the Travel Plan
- xiii) For the avoidance of doubt pursuant to the above and without prejudice to the detail of the Content of the Travel Plan the measures where the County Council shall be entitled to serve a Travel Plan Notice shall include:
 - i) Failure to enter information onto iOnTRAVEL within three months of the due date and no further reasonable explanation being provided by the developer/owner and accepted by Somerset County Council in such cases the Content of the Travel Plan pertaining to such information shall be deemed to not be implemented

Appendix 9

Measures-only Travel Statement and Table of Measures Template

Measures-Only Travel Statement Template

For developments meeting relevant thresholds, you must submit a Measures-only Travel Statement, consisting of a Table of Measures, for approval prior to the commencement of your development.

- This document provides the template to base your submission around.

Your Table of Measures should include all the measures you have already implemented or plan to implement that are specific to your development and that are not already included in detail in any site-wide travel plan for your development. You can obtain a copy of any site-wide travel plan from the developer or Somerset County Council.

TABLE OF MEASURES

The Table of Measures below should include measures relating to physical facilities (such as cycle and motorcycle parking), and information provision (such as leaflets and website travel information).

Action	Location (if a physical measure)	Quantity/level of provision	Start Date	Duration/ End Date	Quality/description
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[List
actions]

Appropriate plans and specifications should be appended for physical measures.

Appendix 10

Business Travel Policies Dossier Template

Business Travel Policies Template

You must submit a business travel policies dossier within three months of occupying your development.

- This document provides the template to base your submission around.

BUSINESS TRAVEL POLICIES – headings

Please provide commentary in the table below and evidence such as copies of HR policies or documents, staff travel information packs, website screenshots, job descriptions, photographs etc.

BUSINESS TRAVEL POLICIES	Commentary	Evidence provided
Business travel hierarchy - favouring smarter travel choices		
Flexible working policies		
Sustainable meeting venues hierarchy		
Bad driving reporting systems		
Employment of a travel plan coordinator and management structure		
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		
On-site cycle repair sessions		
Corporate car loan for work trips		
Reimbursement rates for all Modes of Travel		

Appendix 11

Survey types

Survey types

Guidance on choosing the right type of data collection method

Questionnaire surveys:

A comprehensive way of finding out how people travel is to ask how frequently they use different modes of travel over a year. This picks up occasional trips and even seasonal variations.

This requires data to be reported on the actual number of journeys carried out by people over a year, rather than the number of people choosing a particular travel option on a 'typical' day. This can be converted from the questionnaire data using a spreadsheet that can be obtained from www.movingsomersetforward.co.uk. This is much more effective at detecting fine differences a travel plan has made, including when people have made alterations to their travel habits on selected days, rather than entirely switching from one mode to another, e.g. when people change their travel choices for one or two days per week.

This type of survey also reveals the distances people are travelling – useful for analysing trip distance patterns (e.g. to focus on cutting trip length rather than frequency) and reporting on carbon emissions.

Modal share data must be collected through SCC's standard questionnaire survey template online (using iOnTRAVEL's survey tool, see www.iontravel.co.uk) and in paper form.

Completing household questionnaires:

Responses should include the travel choices of each member of the household in full-time or part time work, excluding trips for educational (learning rather than teaching) or leisure purposes.

Snapshot surveys:

This is similar to the above, but asks how a person travelled on the particular day they were asked the question. It assumes the random 'snapshot' on a particular day will pick up people making both regular and occasional journeys on that day.

Travel diaries:

Travel diaries are a type of self-reporting system, whereby people log on a daily basis how they travel over a week or longer period. This would not pick up seasonal changes unless it was repeated several times in a year. Getting a good response rate might also be difficult because actually filling in the diary would be seen as a nuisance to most people. However, it could be an option where incentives such as Residential Travel Vouchers are used, and developers would like evidence to show that such incentives have made a difference to travel behaviour.

Manual counts:

Where a site is well-contained or isolated, it may be effective to do a manual count of cars, cycles, and motorcycles parked on site and count the number of pedestrians coming through the site gates. This would give a good indication of how the people

who came to work that day travelled. However, it does not count people who are working from home or people who are working off-site that day. You also cannot count car sharers unless you monitor people as they arrive, rather than count parked vehicles.

Automatic counts:

If the number of people likely to be working on the site at any one time is known, automatic counts of cars entering the site can be used to calculate numbers of car drivers and work out this as a percentage of all workers. However, this does not count car sharers unless supported by manual occupancy counts. It is also impossible to differentiate travel-to-work trips from other arrivals such as visitors, travel in the course of work. For residential developments certain time windows might need to be agreed which are assumed to count as work-related trips

Automatic Traffic Counters (ATCs) will be required, which are permanently-installed equipment for the monitoring of vehicle flows/person movements. The locations of ATCs must be determined with Somerset County Council prior to the construction of any part of the site. The responsibility for the implementation of ATCs (including funding the application, advertising, public consultation and implementation of related TROs) will lie with the developer in all cases.

Appendix 12

Calculation of the safeguard sum

Calculation of the safeguard sum

A worked example

The safeguard sum should be calculated using Somerset County Council's standard formula. This is given below. Some examples and a sliding scale are provided below.

- The minimum safeguard sum for a standard development is £10,000 where it is above the DfT's standard travel plan thresholds
- For smaller development below these thresholds, the minimum safeguard sum is £7,000
- For those developments that are double or more than double the DfT's threshold, the minimum safeguard sum is £40,000

All safeguard sums must relate to specified expenditure that will contribute towards the targets in the travel plan.

Safeguards are not penalties or fines; they must be spent directly on matters unrelated to achieving the outcomes in the travel plan. Advice on ways to avoid triggering the implementation of safeguards by producing an effective travel plan is provided in Appendix 5.

Safeguard sum formula:

The safeguard formula divides the total safeguard sum available for any particularly year according to the degree to which the target has been missed, judged by relationship between the target, the measured modal split, and a default worst case scenario of travel by car alone (set as midway between the target and 100% car use). This is shown on the diagram which follows.

T = target split (SOV)
A = actual modal split (SOV)
H = 100% modal split (SOV)
M = midpoint between T and H
E = exceedence
S = total safeguard sum (£)

Annual safeguard amount

=

$$[(A-T)/(H-T)] \times (S \times 2)$$

Example 1:

$$[(74-72)/(100-72)] \times (10,000 \times 2)$$

$$= 2/28 \times 20,000$$

$$= £1,428$$

Example 2:

$$[(86-72)/(100-72)] \times 20,000$$

$$= £10,000$$

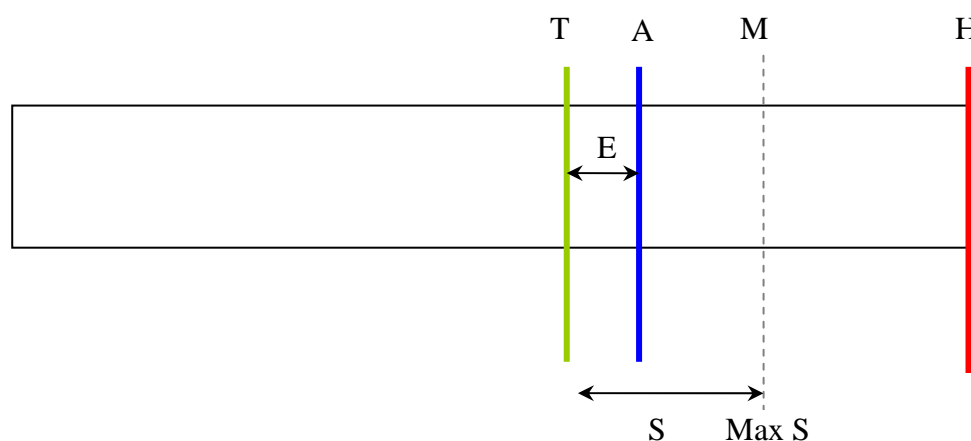
Example 3:

$$[(90-72)/(100-72) \times (10,000 \times 2)]$$

$$= 18/28 \times 20,000$$

$$= £12,857 \text{ but capped to } £10,000$$

Diagram showing relationship between 100% car alone modal split (H), the target (T), the actual measured modal split (A) and a midpoint between T and H (M).



Example of a company with 50 employees:

- target is 50%
- actual modal split is 60%
- the overshoot is 10 percentage points

This equates to getting 5 staff members of staff to travel differently or for 25 staff to travel differently once a week. What are the costs of this? What will £10,000 buy?

- Bus ticket example:

Suppose the cost of a return bus fare is £4.50. To support 25 staff with a 50% reduction on their bus fare, this would cost £56.25 per week. Over a year, this would cost £2597.50 assuming 6 weeks' annual leave for each member of staff. For this incentive to be provided for a period of 4 years following the first annual

monitoring survey, this would amount to £10,350, this using up the total safeguard sum.

- Bus service example:

The cost of an additional bus service is approximately £x per day. A subsidy to provide return journeys for staff would cost £x

- Commuting mileage rate for cycling example:

Suppose the length of a return cycle journey to work is 8 miles. To support 25 staff cycling to work with a 20p per mile incentive, this would cost £40 per week. Over a year, this would cost £1,840 assuming 6 weeks' annual leave for each member of staff. For this incentive to be provided for a period of 4 years following the first annual monitoring survey, this would amount to £7,360, this nearing the total safeguard sum.

- Pedestrian crossing example:

Suppose people could be encouraged to walk to work by the provision of a new pedestrian crossing. To support 5 staff who live nearby to get to work, a pedestrian crossing is to be installed between a nearby residential area and the development. This would cost £x to implement.

- Cycle track example:

Suppose people could be encouraged to cycle to work by the provision of a new cycle route. To support 5 staff who live within cycling distance to get to work, a new on-road cycle route is to be implemented between a suburban residential area and the development, of approximately x km in length also featuring a segregated x km off-road section to avoid a narrow busy stretch of road. This would cost £x to implement.

- Promotional initiatives example:

Although the travel plan includes a travel plan coordinator, this time devoted to this role has not been sufficient to deliver the targets even though measures have been put into place. This have not been promoted well enough and staff have not been involved to a sufficient extent. To counter this, an additional resource to help with x promotions per year is appointed for 1 day per week; the cost of basic pay is £4,600. This extra resource can be provided for 2 years to increase staff awareness of the measures provided in the travel plan within the safeguard sum of £10k.

- Funding through parking revenue – employer-based WPPL:

In the above example, where targets are met 50% of staff continue to travel by car. If these 25 staff are charged £10,000 collectively over 4 years, the equates to a parking fee of only 40p per day per member of staff based on 250 days' parking per year (or £100 each per year).

Appendix 13

Residential Travel Plan Heads of Terms

Residential travel plans

'Standard' s106 heads of terms

Item	Costing
1. Implementation of an approved Full Travel Plan for the development, such travel plan to have been agreed in full prior to the signing of the s106 agreement (prior to reserved matters or commencement of the development), appended to the agreement and supported by a full travel plan schedule which contains a full range of measures to assist with sustainable travel	No stated cost
2. Residential travel vouchers varying between £100-£250 per dwelling (value dependent on the size of the dwelling), repeated for a maximum of three tenures for each property for a period of five years from each occupation, to aid with uptake of smarter travel choices	£100-£250 per dwelling dependent on number of bedrooms 1 - £100 2 - £150 3 - £200 4+ - £250
3. Travel information contribution of £[] to assist the County Council in providing relevant cycle leaflets and bus timetables to be provided by the developer as part of travel information packs and to update existing literature	£[]/dwelling
4. Smarter travel management fund of £[] to aid with the provision of matters such as on-site cycle servicing for residents and other events/one-off promotions to assist a travel plan coordinator promote sustainable travel, and should targets not be met to provide further remedies	£[]/dwelling Money to be released to travel plan coordinator as necessary or to fund directly SCC services such as cycle maintenance sessions
5. Fully-equipped bus stops featuring hard standing, licensed shelters and cycle parking on the stops on [] with a commuted maintenance sum	Commuted sum equal to full implementation cost of a replacement shelter
6. Travel Plan Fee of £[] to assist SCC's role in supervising the implementation of the travel plan as a one-off payment	Dependent on size of development and nature of development (e.g, number of additional uses)
7. Cycle link to £[]	Site specific
8. Off-site cycleway signage improvements £[]	Site specific
9. Personal travel planning	Site specific

Draft standard accompanying text:

Notwithstanding the measures to be covered in point 1, sufficient high quality cycle and motorcycle parking for both residents and visitors should be carefully integrated into the design of the development alongside any other hard on-site measures such as a travel information noticeboard, facilities for a car club vehicle and electric charging of vehicles and cool storage areas should be located and any licensing arrangements agreed in advance. Permeability into and through the development for pedestrians and cyclists should be maximised, and the design of the space on-site should prioritise such movements over other vehicles. [Further physical detail should be included in a revised travel plan.]

Suggested conditions relating to provision of cycle parking and travel information

[TBC]

www.somerset.gov.uk

“Working together for equalities”

This document is also available in Braille, large print, tape and on disc and we can translate it into different languages. We can provide a member of staff to discuss the details. Please contact 0845 345 9166.

