

## Requirement for School Travel Plans through Development Control – DRAFT

### 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"> <li>• Increase in capacity of over 10% or 100 pupils, whichever is the smaller.</li> <li>• Changes to access routes either into or within site</li> <li>• Changes to the catchment area of the school</li> <li>• Significant changes to operational procedure e.g. new facilities allowing public or community access, extended opening hours</li> </ul>
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"> <li>1) School Travel Plan for existing site written within last 2 years and reviewed within the last 12 months.</li> <li>2) Commitment to review travel plan within 6 months of completion of new works.</li> </ol>
Level 2	<p>As for Level 1 plus the following:</p> <ol style="list-style-type: none"> <li>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.</li> <li>2) Plans of new layout, including a site plan and neighbourhood map showing detailed access routes.</li> <li>3) Copy of any transport assessment completed and details of any recommendations.</li> </ol>
Level 3	<p>As for Level 2, plus the following:</p> <ol style="list-style-type: none"> <li>1a) (For schools moving from an existing site). <ul style="list-style-type: none"> <li>• 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.</li> <li>• Provide an analysis of transport conditions at new site and</li> </ul> </li> </ol>

	<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"> <li>• Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition).</li> </ul> <p>1b) (For new builds)</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Commit to complete a full Travel Plan for the new site within 12 months of occupation (S106 condition).</li> </ul> <p>2) Design and Access Statement and movement diagram.  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.  4) Plans of public transport links</p>
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**Comments to be provided by:**

Level 1	Albert Ward
Level 2	Albert Ward, Len Hampson
Level 3	Albert Ward, Len Hampson, Reggie Tricker 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.

# TRAVEL PLANS

## GREEN TRAVEL VOUCHERS

### How the voucher scheme works

STAGES:	STEPS:
QUESTIONNAIRE	<p>1. Questions in the annual questionnaire to residents:</p> <p>a) Did your household move into this property as a new occupier or new tenant within the last 12 months?</p> <p>b) Has your household been offered a Green Travel Voucher whilst living at this address?</p>
VOUCHER PROVISION	<p>2. Within one month of survey closing date, developer provides letter/'voucher' that confirms a commitment to reimburse resident at 50% of the cost against a set/pre-defined list of expenditure items up to a total maximum allowance for their property (listed)</p>
PURCHASING	<p>3. 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)</p>
REIMBURSEMENT	<p>4. Developer reimburses resident by cheque at their discretion at the next round of survey administration and in any event within 12 months of claim being received</p>
REPORTING	<p>5. Developer informs SCC of reimbursement of expenditure with annual monitoring results</p>

### Permitted expenditure

The intention of the Green Travel Voucher 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](http://www.movingsomersetforward.co.uk)) in the Menu of Measures document under the Encourage theme.

The Green Travel Voucher (or GTV) 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 like for like 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.

## TRAVEL PLAN APPROVAL RECORD

Site Reference:

### 1. PREPARATION OF TRAVEL PLAN

<b>STATEMENT OF TRAVEL PLAN APPROVAL</b>		
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"/>	/ /
		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

<b>STATEMENT OF TRAVEL PLAN COMPLIANCE</b>		
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 SANCTIONS AND ENFORCEMENT NOTICES

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

## Use of conditions

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 stops<sup>1</sup>. 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.

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<sup>1</sup> "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)



## AVOIDING THE ACTIVATION OF SAFEGUARDS

### 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, become ineffective in meeting its targets for implementing measures, or encouraging modal shift towards smarter travel choices.

These risks can be introduced, or minimized, at the following stages which can affect its level of performance against targets:

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

These 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](http://www.movingsomersetforward.co.uk).

## 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
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- 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](http://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](http://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. Amend 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](http://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](http://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](http://www.movingsomersetforward.co.uk).

# 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.

*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:*

- Bus
- Car alone
- Car with Other Person(s)
- Cycling
- Motorcycling (125cc and under)
- Motorcycling (over 125cc)
- Park and Ride
- 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"><li>• Congestion/time spent travelling</li><li>• Cost – parking</li><li>• Cost – fuel</li><li>• Crime/vandalism</li><li>• Environmental Motivation</li><li>• Family / Caring Responsibilities</li><li>• Healthy Living / Exercise</li></ul> | <ul style="list-style-type: none"><li>• Mobility Problems</li><li>• New Job</li><li>• New Transport Service / Route</li><li>• Obtained Driving Licence</li><li>• Parking availability</li><li>• Weather</li><li>• Other</li></ul> |
|---|---|

*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]

## 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 <a href="http://www.movingsomersetforward.co.uk">www.movingsomersetforward.co.uk</a> 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 <del>both as percentages and as absolute numbers of journeys</del> 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, 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.
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

## 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 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

Travel Plan Measure	Timescale for Introduction of Measure
	<p>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</p>
<p>Smarter Travel Information Pack</p>	<p>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</p>
<p>Cycle Parking</p>	<p>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 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</p>



Travel Plan Measure	Timescale for Introduction of Measure
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 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

Travel Plan Measure	Timescale for Introduction of Measure
	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 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 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

Travel Plan Measure	Timescale for Introduction of Measure
	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

# TRAVEL PLAN

## TABLE OF MEASURES TEMPLATE

You must submit a Table of Measures within three months of occupying 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 site and that are not already included in detail in the site-wide travel plan for your development. You can obtain a copy of the site-wide travel plan from the developer or Somerset County Council.

### TABLE OF MEASURES

The Table of Measures below may include additional management measures and/or information about extra physical measures/facilities.

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

# TRAVEL PLAN

## 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 evidence such as copies of HR policies or documents, staff travel information packs, website screenshots, job descriptions, photographs etc.

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



## Further information:

Reggie Tricker  
Workplace Travel Plan Coordinator  
Moving Forward Smarter Choices Team  
Somerset County Council  
County Hall  
Taunton  
TA1 4DY  
[RTricker@somerset.gov.uk](mailto:RTricker@somerset.gov.uk)  
01823 35 8079

## Document and Contents

## Link

### Site Audit and Design Guidelines

- Why get to know your site?
- What to look at
- How to collect information
- Reporting on what you've found

<http://www.movingsomersetforward.co.uk/new-developments/manual-travel-plans/site-audit-and-design-guidelines>

### Site Audit Polar Plot

- To include in your travel plan

<http://www.movingsomersetforward.co.uk/new-developments/travel-plan-resource-centre/travel-analysis>

### Menu of Measures

- EXEMPLIFY - Management understanding and support
- ENCOURAGE - Subsidies, incentives, and on-site facilities
- EDUCATE - Practical information about travel choices
- ENFORCE - Parking and links to local policy
- ENABLE - Services and deliveries

<http://www.movingsomersetforward.co.uk/new-developments/manual-travel-plans/menu-measures>

#### Summary:

<http://www.movingsomersetforward.co.uk/business/employers>

### Visitor travel suggestions

<http://www.movingsomersetforward.co.uk/new-developments/travel-plan-resource-centre/visitor-travel-factsheets>

### Monitoring Guidance

- The rewards of smarter travel
- Getting information about travel choices
- Reporting on how people travel
- Planning for sustainable travel and using targets

<http://www.movingsomersetforward.co.uk/new-developments/manual-travel-plans/monitoring-guidance>

### Target setting and reporting templates

- To include in your travel plan

<http://www.movingsomersetforward.co.uk/new-developments/travel-plan-resource-centre/travel-analysis>

## Survey types

- 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 in the online Travel Plan Resource Centre. 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.

### **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 Green 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.

## Calculation of the safeguard – worked example

The safeguard sum should be calculated using Somerset County Council's standard formula. 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 X.

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

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

### Example 1:

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

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

$$= £1,428$$

### Example 2:

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

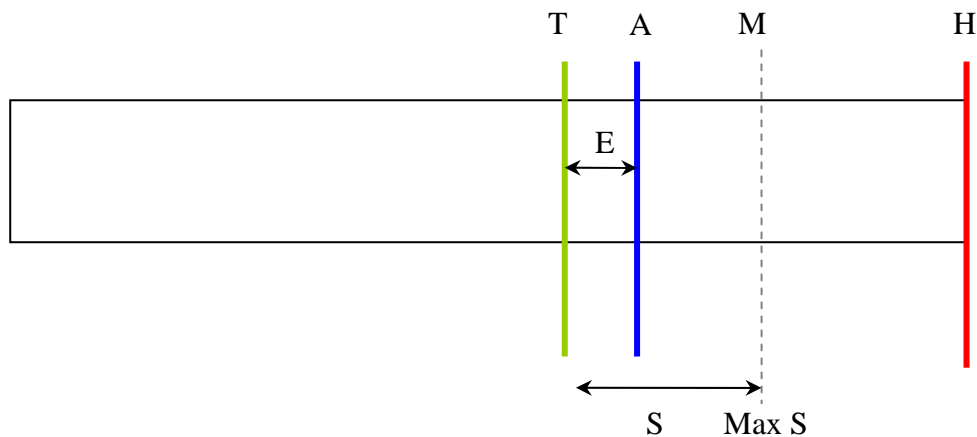
$$= £10,000$$

### Example 3:

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

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

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



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).