

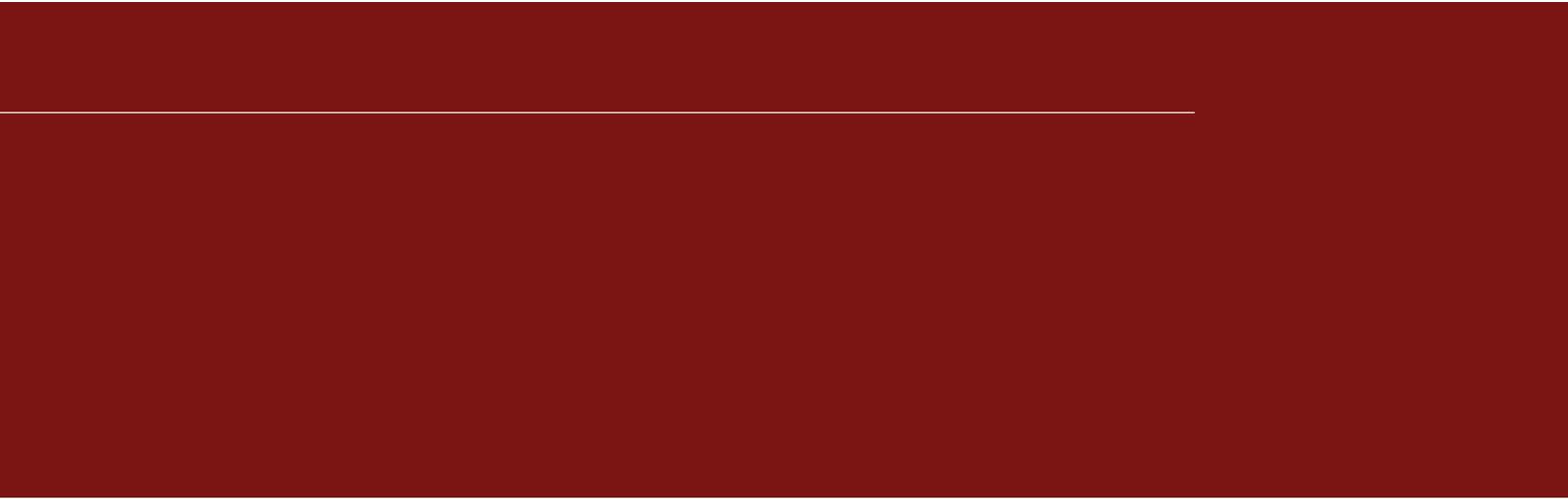
Travel Plans

Supplementary Planning Guidance Note

July 2012

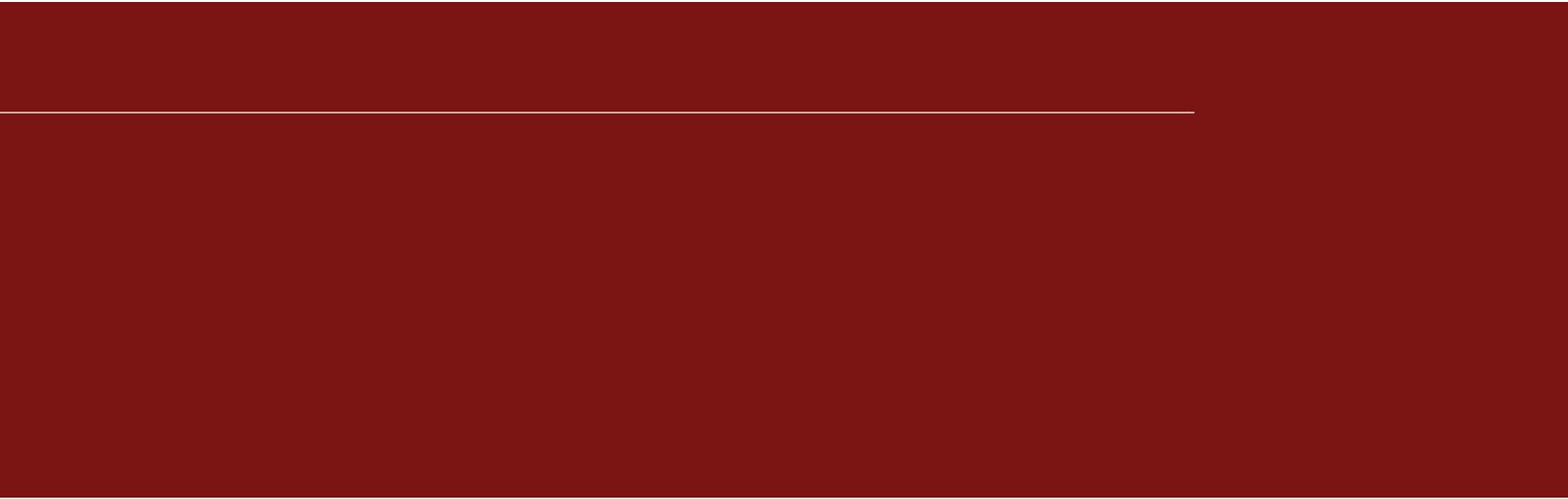


Falkirk Council
Development Services





1. Who is the guidance for?
 2. What is a Travel Plan?
 3. Policy Context
 4. When a Travel Plan is Required
 5. Travel Plan Frameworks
 6. Residential Travel Plans
 7. Business Travel Plans
 8. School Travel Plans
 9. Travel Plan Statements
 10. Targets
 11. Monitoring
 12. Enforcement
- Appendix 1: Further Information





1. Who is the guidance for?

This guidance note is primarily intended to provide advice for developers who need to submit a Travel Plan as part of their development. It provides a background to Travel Plans and guidance as to when Travel Plans are required and what Falkirk Council expects from developers.

This guidance can also be used by any organisation wishing to develop a Travel Plan for an existing site.

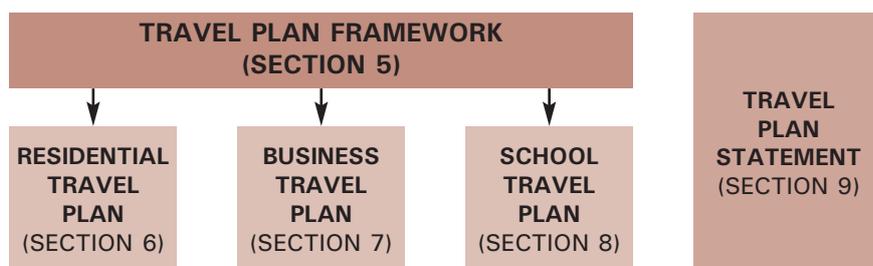
2. What is a Travel Plan?

A Travel Plan is a package of measures aimed at reducing the number of car journeys, in particular single occupancy trips, to and from a development or residential area. It should encourage the use of sustainable transport and aim to reduce the impact of a development on the surrounding road network.

Table 1: Threshold Sizes for Developments

Benefits for the:	Developer	Occupier	Site user	Resident
Improved site access	√	√	√	√
Less congestion on local roads			√	√
Reduced demand for parking spaces	√	√		
Improved travel choice and access to key services	√	√	√	√
Help to meet an organisation's environmental objectives	√	√		
Increase business efficiency and equality		√	√	
Local environmental improvements from reduced congestion, pollution and noise				√
Opportunities for active, healthy travel			√	√
Reduced delivery costs and improved security	√	√		
More reliable and timely deliveries resulting in less disruption to normal business practices	√	√		
Opportunity to feed into corporate social responsibility programme	√	√		

There are three main types of Travel Plan. This SPG considers the central Framework, the Travel Plans themselves and, for smaller developments, Travel Plan Statements.





3. Policy Context

National Context: SPP and PAN75

The consolidated Scottish Planning Policy, published February 2010, sets out the Scottish Government's policy on land use planning. The SPP's guiding principle with regard to transport is to encourage modal shift from car-based travel to walking, cycling and public transport. The planning system supports a pattern of development which reduces the need to travel, facilitates travel by public transport and provides safe and convenient opportunities for walking and cycling. Opportunities for personal travel should be prioritised by mode in the following order:

- ❖ Walking
- ❖ Cycling
- ❖ Public transport
- ❖ Car and other motorised vehicles.

The SPP also encourages the development of Travel Plans for all significant traffic generating developments.

Planning Advice Note 75 - Planning For Transport, issued August 2005, provides good practice advice on measures that planning authorities may consider in fulfilling their integrated land use and transport planning responsibilities in a sustainable manner, and in doing so promote the development and uptake of Travel Plans.

Regional Context: SEStran Regional Transport Strategy 2008 - 2023

The South East Scotland Transport Partnership's (SEStran) Regional Transport Strategy (RTS) sets out a clear framework for the future direction of investment in, and management of, transport in the SEStran area (of which Falkirk Council is a part) for the next 10-15 years.

The RTS sets the implementation of Travel Plans as a high priority, due to its potential effectiveness against a wide range of RTS objectives.

Local Context: Falkirk Council Structure Plan

The Falkirk Council Structure Plan was originally approved by Scottish Ministers in 2002, with the First Alteration approved in 2007.

Policy TRANS. 3 states that development proposals, which could result in a significant increase in travel demand, will be required to submit a Transport Assessment and, where appropriate, a Travel Plan. The Transport Assessment and Travel Plan should demonstrate how the impact of the development on the surrounding traffic network can be minimised and how other modes of travel other than the car will be encouraged.

The Structure Plan also states that developers, where required, will be required to enter Planning Agreements to ensure the delivery of mitigation measures.

Local Context: Falkirk Council Local Plan

The Falkirk Council Local Plan was adopted in December 2010, and provides the detailed statutory framework for the Council area in accordance with the provisions of the Town and Country Planning (Scotland) Act 1997 and its associated regulations.

Policy ST7 states the requirement for Transport Assessments are for developments where the impact of that development on the transport network is considered to require mitigation, and that Transport Assessments will include Travel Plans.

Developers will agree the scope of the assessment with Falkirk Council and then undertake the assessment in accordance with the scoping. In all cases, the assessment will focus on the hierarchy of transport modes, favouring the use of walking, cycling and public transport over unnecessary use of the car. The Council will only grant planning permission where it is satisfied that the Transport Assessment and Travel Plan has been appropriately scoped, the network impacts properly defined and suitable mitigation measures identified.

Local Context:

Falkirk Council Local Transport Strategy

The Local Transport Strategy (LTS) sets out action which is designed to combat the effects of rising traffic whilst recognising the work of the transport strategy on its own cannot fully address these impacts. The Council's vision for transport is: "to provide a transport network both within the Council area and linking to surrounding areas, which allows people a reasonable choice of travel options as part of a safe, reliable, convenient, accessible and sustainable transport system. To enable people to travel when and where they wish, regardless of their level of income, physical ability or access to a car. To achieve a transport system that caters for the car, but is not dominated by it."

Within the LTS, the Council commits to developing Travel Plans with local businesses and organisations in the Council area. The Council is also developing a series of Travel Plans for its offices.



4. When a Travel Plan is Required

It is vital for all developers to have an understanding of when a Travel Plan will be required as part of a planning application. This section identifies the circumstances and scenarios when the Council will require a Travel Plan to be submitted.

The following thresholds indicate when a Travel Plan is needed for planning applications, including PPP developments.

Table 2: Threshold Sizes for Developments

Use	Threshold at, or above which, a Travel Plan is required
Food Retail	1,000 m ² Gross Floor Area
Non-Food Retail	1,000 m ² Gross Floor Area
Cinemas and Conference Facilities	1,000 m ² Gross Floor Area
Leisure Facilities	1,000 m ² Gross Floor Area
Business	2,500 m ² Gross Floor Area
Industry	5,000 m ² Gross Floor Area
Distribution and Warehousing	10,000 m ² Gross Floor Area
Hospitals	2,500 m ² Gross Floor Area
Schools	All new schools
Higher and Further Education	2,500 m ² Gross Floor Area
Stadia	1,500 seats
Housing	100 dwellings

The thresholds in Table 1 are indicative only, and there may be circumstances where a Travel Plan could be required for smaller scale residential developments, or a business with a high proportion of staff and therefore a higher impact. A Travel Plan may also be required for sites with small numbers of staff, but with significant numbers of trips generated by those visiting the site.

The Travel Plan will initially be required as part of the outline planning application. At the outline stage, Falkirk Council will require a Travel Plan Framework including outline aims and measures, but lacking specific mode share targets and measures. Initial targets could be submitted in line with Falkirk Council's Local Transport Strategy. As part of the detailed planning application, Falkirk Council will require more detailed aims and measures to be set, along with a requirement for full mode share targets to be set following a travel survey, to be carried out following occupation. The Travel Plan should always include as much information as possible at all stages during the planning application process.

When a Travel Plan is required Falkirk Council will seek to ensure implementation by planning condition or a legal agreement under Section 75 of the Town and Country Planning (Scotland) Act 1997, as amended. A bond may also be payable to ensure that, should targets not be met, funds are available for remedial works to be carried out to minimise the impact of the development on the surrounding transport network.

Typically the steps involved in producing a Travel Plan are:

Step 1:

Scoping exercise for Transport Assessment and Travel Plan with Falkirk Council officers

Step 2:

Develop a Travel Plan Framework, including aims, objectives, targets and measures

Step 3:

Carry out a full travel survey following occupation of development

Step 4:

Develop a full Travel Plan, including a stringent monitoring strategy

Step 5:

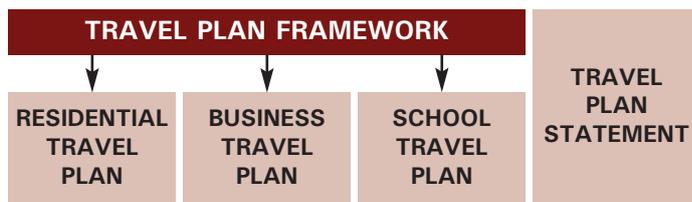
Draft Travel Plan submitted to Council

Step 6:

Implementation of Travel Plan and monitoring

There are many sources of detailed information on how to develop a Travel Plan. Please refer to the 'Further Information' section for more details.

5. Travel Plan Frameworks



For speculative developments, or where the end user(s) of the development is unknown (including multi-occupant sites), the Council will require a Travel Plan Framework document to be submitted as part of the planning application (usually included in the Transport Assessment). The Travel Plan Framework will be essentially a framework around which a more robust Travel Plan can be framed or individual Travel Plans for specific occupants of a development can be produced as those units become occupied.

The Framework must therefore be a tool that the business and other occupants can develop realistic and deliverable Travel Plans when the development is operational. It should provide sufficient information on key areas to support the development of the final Travel Plan(s). The Travel Plan Framework will include objectives, a programme for developing and submitting the full Travel Plan, measures required, and a robust monitoring strategy. However, the Framework may lack detailed data on the travel characteristics of the end user and specific measures.

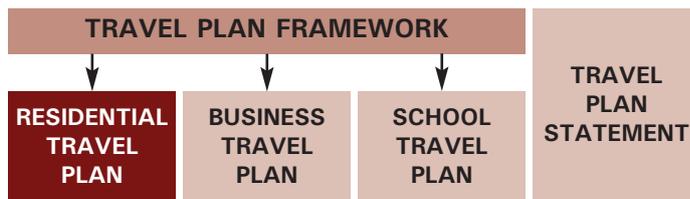
A commitment will be required, of the developer, that future occupants of the site will be obliged to adhere to the previously submitted Framework, to progress it and to monitor it. This will form the basis of a Section 75 Agreement with the developer.

The Section 75 Agreement will also include a commitment to a date by which an approved full Travel Plan will be prepared. After the site is occupied a travel survey should be carried out within six months and the Travel Plan should then be finalised and agreed between the occupiers and Falkirk Council within a further three months. Timescales for implementation should then be set and monitoring procedures put in place.

The Travel Plan should then be implemented and monitoring begun. Individual site circumstances may dictate that a different approach to that indicated above may be appropriate.



6. Residential Travel Plans



All residential developments consisting of 100 or more dwellings will automatically require a residential Travel Plan.

A residential Travel Plan is 'origin' based. It should be used to promote travel choice by increasing the awareness and relative advantage of transport alternatives to the car.

For new residential developments, Travel Plans can be used to set out measures which may be an incentive for house purchasers to choose a particular development or to use non-car modes for certain journeys. In many cases house purchasers are new to an area and are not aware of the local facilities and services available. A residential Travel Plan should focus on the dissemination of information to residents through a Travel Plan Pack.

A Travel Plan Pack for a residential development could include the following:

- ❖ Safer routes to schools;
- ❖ Walking and cycling routes to local facilities i.e. health services, post office, shops, library;
- ❖ Location of facilities available on site e.g. post boxes, play parks, recreational paths;
- ❖ Access to public transport e.g. closest bus stop and service information, closest rail station and facilities available (car/cycle parking);
- ❖ Bus and train timetables;
- ❖ Discounts from public transport operators e.g. a week's free use in the first month of occupation;
- ❖ Cycle paths and walking routes through the development and linkages to other paths and facilities.

It is generally accepted that a pedestrian will walk for approximately 20 minutes and cyclists will travel between 30 and 40 minutes to access jobs and services.

Unlike other Travel Plans, it is not appropriate to set modal targets or review and revise the original plan in housing developments. It is therefore critical that Travel Plans for residential developments are made available to all purchasers and the Travel Plan Packs are updated as the development progresses. This maximises the potential to create a sustainable development for the benefit of the whole community.

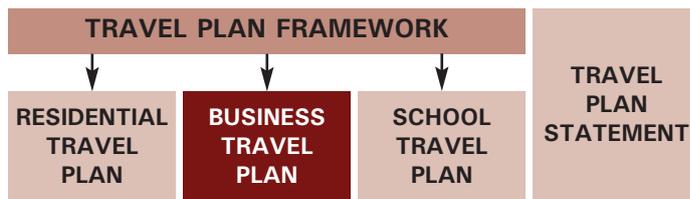
It is important that a residential Travel Plan is in place as a development begins to be occupied, so that residents have the opportunity to choose sustainable travel options from the beginning, before the habit of car use from their new home becomes established.

A residential Travel Plan would be expected to contain the following information:

- 1. Introduction - description of the site**
 - a. Definition of a Travel Plan
 - b. Why the Travel Plan is required
 - c. Where it is located and its size
 - d. The number of existing and potential residents and visitors
- 2. Backing of Developers/
Residents for the Travel Plan**
- 3. Policies: National, Regional, Local**
- 4. Objectives of the Travel Plan**
- 5. Benefits**
 - a. For site users - residents, visitors etc.
 - b. For the community/neighbours
- 6. Current transport provision and facilities to/at the site**
 - a. Walking
 - b. Cycling
 - c. Public Transport – bus, train, taxi etc.
 - d. Cars
- 7. Proposed actions and measures to achieve the objectives**
 - a. Role of the developers and potential residents groups
 - b. Travel Plan activity pre/post occupation
 - i. Walking
 - ii. Cycling
 - iii. Public Transport – bus, train, taxi
 - iv. Cars / other vehicles
 - v. Summary of Car Parking Strategy



7. Business Travel Plans



For the purpose of this SPG, Business Travel Plans cover all developments shown in Table 1 (see page 7), excluding schools and housing.

All developments which meet the threshold for a Transport Assessment (shown in Table 2) will be required to produce a Travel Plan. The nature of this will depend on the size of a development; however aims, targets and monitoring procedures will be required in each case. For smaller scale developments, where a Transport Statement is required, this will be accompanied by a Travel Plan Statement. More information about Travel Plan Statements is included in Chapter 9. Clarification should be sought early in the planning process from Falkirk Council's Transport Planning Unit on exactly what will be required.

Business Travel Plans are destination based instead of origin based. Businesses will generally have some control over the use made of its car parking facilities and so will be expected to demonstrate how that control will be exercised.

The content of a Travel Plan will vary according to the location of the site, the use of the site and the required outcomes arising out of the Transport Assessment. However, a Travel Plan for a business or leisure development would be expected to include the following:

1. **Introduction - description of the site**
 - a. Why the Travel Plan is required
 - b. What the site's purpose is
 - c. Where it is located and its size
 - d. How many existing and potential staff and visitors
2. **Backing of Senior Management/ the organisation for the Travel Plan**
3. **Policies : National, Regional, Local, Company/Organisation**

4. Objectives of the Travel Plan

5. Benefits

- a. For site users - customers, employees, supply companies etc.
- b. For the organisation
- c. For the community

6. Current transport provision and facilities to/at the site

- a. Walking
- b. Cycling
- c. Public Transport - bus, train, etc.
- d. Cars

7. Baseline Travel Data

- a. Information about existing modes of travel and attitudinal information from employees and other site users

8. Proposed actions and measures to achieve the objectives

- a. Appointment of/allocation of Travel Plan Co-ordination role
- b. Walking
- c. Cycling
- d. Public Transport – bus, train, taxi etc
- e. Cars/other vehicles
- f. Summary of Car Parking Strategy

9. Targets (SMART*)

- a. Current modal split
- b. Targets with defined timescales (no more than 5 years)

10. Monitoring

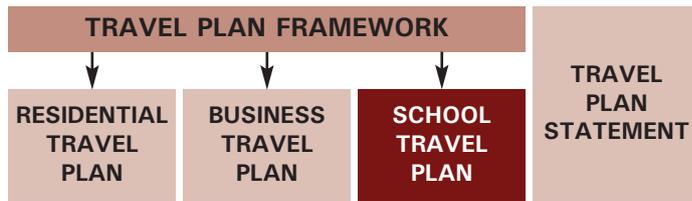
- a. Annual Surveys to be provided to the Local Authority
- b. Reporting procedures to senior management, employees and local authority
- c. Review of the Travel Plan and changes.

Some ideas which can help encourage the use of sustainable transport are :-

- ♦ Operation of a car sharing database
- ♦ On site provision of local public transport information
- ♦ Loans/discounts for bus/rail season tickets
- ♦ High quality pedestrian links to bus stops
- ♦ Loans for cycle purchase
- ♦ Cycle parking and showering facilities.

*see Section 10

8. School Travel Plans



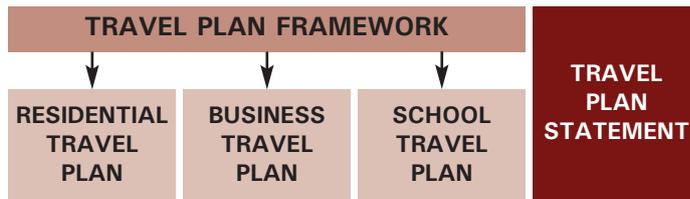
All new school developments (including stand alone nursery schools), regardless of size, will be required to produce a Travel Plan. Like business developments, School Travel Plans are destination based, and will be expected to encourage parents, children and staff to travel sustainably to school.

A School Travel Plan would be expected to include the following:

1. **Introduction - background to the Travel Plan**
 - a. Site description
 - b. School information
2. **Backing of Senior Management/ the organisation for the Travel Plan**
3. **Policies : National, Regional, Local**
4. **Measures**
 - a. Walk to School projects
 - b. Cycle training
 - c. Junior Road Safety Initiative
 - d. Responsible Car Use
 - e. Eco Schools
5. **Action Plan**
6. **Targets (SMART*)**
 - a. Current modal split
 - b. Targets with defined timescales
7. **Monitoring and evaluation**



9. Travel Plan Statements



Where a Transport Statement is required in place of a full Transport Assessment, for developments which are likely to generate a lower level of trips, and have only a minor impact, a Travel Plan Statement will be required. A Travel Plan Statement will normally focus on targets relating to the introduction of measures aimed at providing travel options to occupants and visitors. Usually these will be fairly simple and have targets centred on raising awareness of non-car travel and relating to the health and environmental advantages of sustainable travel. Although simple, they will still be required to implement specific measures to promote non-car travel such as installing cycle storage facilities or promotion of sustainable travel options.

Developers are advised to consult Falkirk Council's Transport Planning Unit at an early stage in the planning process to determine exactly what will be required in terms of a Travel Plan.

10. Targets

All Travel Plans for business and school developments should contain targets to assess whether the Plan has been successful in achieving its objectives.

In order to measure the effectiveness of the plan, baseline data is required. The setting of targets will be possible after present travel patterns of existing staff and visitors are surveyed to provide baseline data. For new developments targets can be set based on travel patterns from similar developments in the area. However, these will need to be revised once a survey of the new occupants has been undertaken, normally within six months of occupation.

Targets should be SMART (Specific, Measurable, Achievable, Realistic, Time-bound), and can take the form of both 'action-type' targets and 'aim-type' targets.

Action-type targets are non-quantifiable, taking the form of actions that need to be achieved. Clear target dates still need to be specified. Examples include:

- ◆ Appoint a Travel Plan Co-ordinator
- ◆ Set up a car share database
- ◆ Produce a leaflet detailing the public transport links available to the site and ensure all staff receive a copy

Action-type targets are generally easier to achieve and to monitor as they are usually one-off events. It can be useful to include some of these to ensure some 'quick wins' and to maintain the momentum for the Travel Plan.

Aim-type targets are quantifiable. These should be realistic and achievable, but also challenging. Commuting targets should be based on the results of your staff travel survey, using existing travel patterns and identified opportunities to change. For example, if 3% of your staff said that they would consider cycling if facilities at your workplace were improved, it would be unrealistic to set a target of 15% of the workforce cycling within five years.

Examples of aim-type targets are:

- ◆ An x% reduction in car driver trips by 20xx
- ◆ A reduction in the requirement for car park spaces
- ◆ An x% increase in the number of train/bus journeys to and from the workplace
- ◆ A x% increase in the number of travel passes issued
- ◆ A x% increase in cycling mileage claims and a y% decrease in car mileage claims

A mix of action-type and aim-type targets should be considered to give you both the 'quick wins' as well as the quantifiable means for assessing the effectiveness of the Travel Plan.

Key considerations for each action/target should include timescales, person responsible, monitoring and any potential costs. This will assist in achieving the objectives of your Travel Plan.

The successful implementation of Travel Plans will be assessed both by whether the measures committed to have been introduced by an agreed time, and whether these measures are having the desired outcome.

For Travel Plan Statements, whilst outcome based data would be desirable, often an account of whether the measures pledged have been implemented is the only pragmatic form of assessment. Falkirk Council will expect to see the agreed measures completed before occupation or within a specified date of occupation.



11. Monitoring

All Travel Plans are required to be monitored and reviewed. The procedure for monitoring (and the duration of monitoring period) of Travel Plans secured through the Planning Process must be clearly defined when an application is determined. Typically, Falkirk Council will expect a minimum of 5 years annual monitoring, followed by 5 years biennial monitoring to take place.

The developer or occupier will be responsible for monitoring the effect of the Plan although, in certain cases, developers can be asked to install monitoring tools such as traffic counters. Where developers are required to undertake monitoring, the information will normally be collected through surveys undertaken annually. The findings of these surveys, with raw data if requested, will be presented to the Council and the Council will reserve the right to audit the results.

For new business and leisure developments, a baseline travel survey will typically be expected within 6 months of the development opening. The Travel Plan should be submitted within 3 months of the baseline travel survey, and the first monitoring survey should be carried out twelve months following the initial baseline survey.

The content of the travel surveys should be agreed with Falkirk Council's Transport Planning Unit prior to the survey being undertaken. This can normally be done as an appendix to the Travel Plan Framework. The travel surveys are the responsibility of the developer/occupier of the site.

When carrying out the travel survey, it is good practice to review the aims and action points of the Travel Plan. This review should be submitted to Falkirk Council along with the travel survey results.

The Choose Another Way website gives a guide to promoting sustainable travel, travel plan guidance, case studies and the My Travel Plan Tool, which provides a facility for carrying out regular travel surveys, capture monitoring data on travel plan measures and produce reports on your travel plan. Visit www.chooseanotherway.com

12. Enforcement

The Section 75 Agreement will normally contain an undertaking by the developer (which would be required to be passed on to the future occupier) to accept that stronger measures will be required to be introduced to the Travel Plan should the initial monitoring (normally 2 years post implementation of the Travel Plan) show that the relevant targets have not been met. The Section 75 Agreement will explain that in such circumstances, the relevant sections of the Travel Plan will require to be redrafted and agreed with the Council to incorporate the new measures. The aim of these stronger measures will be to enable the organisation to meet the next set of targets within their Travel Plan (normally 5 years).

The developer/occupier must be fully aware of the potential cost implications of the new measures at the Agreement stage and examples and indicative costs should therefore be given where possible. Where it is apparent at the Agreement stage that the implications of failing to meet the targets will require specific local measures to compensate for this e.g. the introduction of a residents parking scheme, these measures should be identified (with likely costs) and specified within the Agreement.

If, after the introduction of the stronger measures, the 5 year targets are not achieved, a further review of the Travel Plan will take place and additional measures will again be agreed with the Council. The monitoring process will continue for a further 5 years (with surveys and evaluation meetings with the Council at the 7 and 10 year milestones).

Possible sanctions, particularly with relation to full Travel Plans may include:

- ♦ Payments to the Council to fund agreed measures to achieve compliance of targets if agreed trip rates are exceeded. This would normally be assessed automatically using trip counters.
- ♦ The necessity for additional measures (over and above those in the original travel plan) to be implemented if previously agreed targets have not been met.

The developer should ensure future owners and occupiers of the site are fully aware of the obligations detailed in the Travel Plan.



Appendix 1: Further Information

Developers are advised to seek advice from Development Services (Transport Planning Unit) staff at an early stage, to determine what level of Travel Plan information will be required for their development. They are also advised to take professional advice before embarking on the preparation of a Travel Plan.

The Falkirk Council website www.falkirk.gov.uk/taketherightroute contains information on Travel Plans and School Travel Plans.

Choose Another Way gives a guide to promoting sustainable travel, travel plan guidance, case studies and the My Travel Plan Tool. There is also information of how to develop School Travel Plans. Visit www.chooseanotherway.com

There are many sources of detailed information on how to develop a Travel Plan. These include the best practice guide 'A Travel Plan Resource Pack for Employers', and 'The Essential Guide to Travel Planning', available at www.dft.gov.uk/topics/sustainable/travel-plans/

These guides provide information, examples and case studies detailing the successful development of a Travel Plan.





Falkirk Council

Development Services