



DUMFRIES AND
GALLOWAY COUNCIL

Local Development Plan

Supplementary Guidance

Adopted 1st December 2014



Travel Plans



DUMFRIES AND GALLOWAY LOCAL DEVELOPMENT PLAN SUPPLEMENTARY GUIDANCE

TRAVEL PLANS: a guide for developers

CONTENTS	PAGE
Who should develop a Travel Plan?	2
What is a Travel Plan?	2
The relationship between the Travel Plan and Transport Assessment	2
What are the advantages of a Travel Plan?	3
How do I get started on preparing a Travel Plan?	3
What should the Travel Plan contain?	6
Who is responsible for the Travel Plan?	6
What can the Council do to help?	7
Enforcement	7
Monitoring and Evaluation	7
Other useful information	8
Appendix 1 Travel Plan suggested content	9



Who should develop a Travel Plan?

Travel plans will be required for significant travel generating uses. This could involve major developments but they may also be requested for smaller developments if it is considered that the travel plan will assist in addressing traffic, access or any air quality issues in the vicinity. Often a developer will need additional specialist input from an experienced Transport Consultant.

A travel plan can bring a host of benefits to a new development for: the developer; the eventual occupier; the users of the site including employees, customers, visitors, suppliers and delivery companies; local residents and the Council.

What is a Travel Plan?

A Travel Plan is a generic title for a package of measures aimed at promoting more sustainable travel choices to and from a development, with an emphasis on reducing reliance on the private car (particularly single occupancy car travel) thereby lessening the impact on both the environment and the surrounding road network as well as increasing the health benefits of active travel. The travel plan is an important tool in considering and assessing the transport and access issues in relation to a development.

As a general guideline, a Travel Plan will be required for developments which exceed the following thresholds (*this matches with the requirement thresholds for a transport assessment*):

- Food retail >1,000m² Gross Floor Area;
- Non-food retail >1,000m² Gross Floor Area;
- Cinemas and conference facilities >1,000m² Gross Floor Area;
- Leisure facilities >1,000m² Gross Floor Area;
- Business >2,500m² Gross Floor Area;
- Industry >5,000m² Gross Floor Area;
- Distribution and warehousing >10,000m² Gross Floor Area;
- Hospitals >2,500m² Gross Floor Area;

- Higher and further education >2,500m² Gross Floor Area;
- Stadia >1,500 seats;
- Housing >100 dwellings;
- All schools (Dumfries and Galloway Council requirement).

Developments which fall below these thresholds are also encouraged to prepare Travel Plans in support of applications and to add value to the development.

The objectives of the Travel Plan can be achieved through a package of physical and promotional measures that:

- Reduce the need to access the site, for example by supporting home working;
- Support access to the site by walking, cycling or public transport;
- Support car sharing;
- Manage car parking provision to support the modal share objectives;
- Minimise the impact of traffic at any one time through the consideration of shift patterns and / or opening and closing hours;
- Facilitate choice by offering support to employees through schemes to cater for travel at the end of late shifts or in response to unforeseen domestic needs.

The Relationship Between the Travel Plan and Transport Assessment

A travel plan should be developed in conjunction with a transport assessment. A transport assessment is a supporting technical document that accompanies certain planning applications and identifies any significant effects on road and public transport networks, including walking and cycling. If the development is large enough the transport assessment may include an accessibility study and be based on an agreed scoping study. It should consider the phases of the development and construction. The transport assessment provides the detail of the transport conditions, likely impact of development and provides mitigation measures to maximise the sustainability of transport to the development.



The travel plan is the long-term strategy to encourage and maintain the use of these mitigation measures, maximising the potential for achieving sustainable travel behaviour.

The transport assessment should identify what mitigation measures may be required to deal with the predicted transport impacts and how improvements in accessibility and safety, especially for pedestrians, cyclists and public transport users will be made. The transport assessment will inform both the final design of the development and the travel plan. It will identify how the travel plan can help address the impact of the proposed development through the promotion of sustainable transport.

The transport assessment and the travel plan should be developed in parallel to ensure the Council is satisfied that the travel plan measures and mechanisms will deliver and maintain the effectiveness of the necessary mitigations. It is also important that the travel plan includes targets and that these are set out clearly. If necessary, these should be supported by a legal bond agreement to ensure they are achieved.

It is vital that the Travel Plan is in place, operational and effective from "day one". Mitigation measures should be put in place at an early stage of construction so that they are available immediately to early occupiers of the development to ensure that sustainable travel patterns are established immediately. The first experience someone has of using an alternative mode of transport must be a positive one if long term modal shift is to be achieved. This is of particular importance when the measure provides enhancement to the wider network and promotes sustainable travel within the vicinity prior to completion, which will in turn promote sustainable travel to and from the development.

What are the advantages of a Travel Plan?

Travel Plans can give an organisation a competitive advantage by:

- Enhancing the value and desirability of the development;
- Saving money by reducing the development footprint required;
- Reducing congestion around the site and in general;
- Reducing the cost of business travel, among employees and residents;
- Promoting healthy living and improving productivity from a healthier workforce (also saving on sick leave costs);
- Widening the potential labour pool to include those that do not have access to a car;
- Enhancing recruitment packages, business image and public profile;
- Meeting corporate goals e.g. corporate and social responsibility, quality assurance and environmental management, including making positive contributions to reducing greenhouse gas emissions and mitigating against climate change.

How do I get started on preparing a Travel Plan?

Travel Plans should be site-specific. Measures and objectives should reflect the individual characteristics of a site as well as the trips likely to be generated by that development and complement or enhance the existing infrastructure. They should contain a range of measures to ensure that the site is accessible by a variety of modes of transport, and that private car use to and from the site is discouraged via a combination of incentives and disincentives.

A number of steps have been identified that, if followed, will help to ensure a Travel Plan is successful. This will also help to create an initiative that is an ongoing commitment rather than a one-off event. Although these are most relevant for workplaces, the steps can also be adapted to suit a residential development:



Step 1 Secure senior management support

Senior management support is critical to ensuring the success of any travel plan for a number of reasons such as to:

- Lead by example;
- Allow budget allocations for the implementation of measures; and
- Give support to changes or development of policy documentation.

Step 2 Identify roles and responsibilities

It is important to have an individual responsible for the co-ordination of the travel plan, and where others are required to assist in the development of measures it is best to identify specific individuals and the tasks.

Step 3 Undertake a site assessment

A site assessment is necessary to establish what facilities are currently available to support travel by different modes and to identify what provision may be required to encourage modal shift.

Step 4 Undertake a staff / resident travel survey

It is necessary to undertake a travel survey to identify how and why people travel the way they do. A survey of this nature also provides a base to establish what would make them change behaviour. Regular follow-up surveys should be undertaken to assess the Plan's progress and ensure it remains current.

Step 5 Undertake travel audits

Travel audits may also be undertaken to look at broader issues such as business travel, travel by visitors, deliveries and use of fleet vehicles.

Step 6 Identify objectives, targets and indicators

The plan should be site-specific, tailored to suit the individual development. In order to take forward the travel plan it is important to set out clear objectives and targets in order to measure its success and ensure direction with key milestone dates for delivery. Targets can include, for example, the numbers of vehicles accessing the site.

Step 7 Identify and implement measures

Using the information collected, measures to be taken forward should be identified.

The plan should include a comprehensive package of measures, including incentives and disincentives to bring about change. The Plan should also identify a funding stream for new infrastructure, initiatives, promotion and marketing.

Step 8 Monitoring

This allows progress to be followed and targets to be revised where appropriate. This monitoring regime must also include agreed dates on which to report progress against the targets and/or milestones.

Table 1 overleaf offers some suggestions on the phasing and preparation of the Travel Plan, outlining who is responsible for action during each stage of the planning application process.

Table 1: Phasing and Preparation of Travel Plan

Planning phase		Implementation phase	
<i>Pre-application</i>		<i>Post-permission and pre-opening</i>	
<i>Submission</i>		<i>Post opening</i>	
Applicant / Occupier			
Establish: the need for a travel plan; relationship with any transport assessment; the form of the travel plan.	Develop the travel plan; submit to Council.	Update and expand travel plan in accordance with conditions and / or planning agreement. Begin to implement appropriate measures prior to occupation.	Undertake baseline surveys. Submit revised baseline data to Council.
	Submit agreed final version of travel plan (possibly with interim elements) alongside planning application to the Council.		Monitor and review travel plan. Submit ongoing monitoring reports and any updated travel plan to Council as agreed.
Applicant / Occupier and Council			
Discuss and agree: any specific access / transport improvements; scope of travel plan Legal mechanisms for securing the travel plan including conditions of termination and a backstop date (typically 5 years).	Resolve terms of any legal agreement including conditions or planning agreement.		Agree revisions to targets where necessary. Agree completion of targets and disposal of any bond sum.
Council			
Review travel plan. Advise applicant of any amendments required.	Prepare legal agreement. Formally review final version of travel plan.		Review ongoing monitoring reports and any updated travel plan and advise applicant / occupier accordingly.



What should the Travel Plan contain?

Workplace Travel Plans:

Workplace Travel Plans can address commuter journeys to work, customer access, business travel and fleet management and they can encompass the movement of freight as well as people.

Typical workplace travel plan measures include:

- Encouraging walking and cycling to the development using facilities provided via the Transport Assessment process / planning permission;
- Encouraging the use of cycle parking facilities;
- Providing showers and changing facilities for cyclists and pedestrians;
- Encouraging the use of any bus services to the development which already exist or have been provided as part of any planning agreement;
- Providing tele- and video-conferencing facilities to reduce the need for business travel;
- Providing a pool car or car club vehicle for employees who need the use of a car during the working day;
- Negotiating discounted public transport fares for employees;
- Car park management such as deliberately limiting staff parking or charging staff for car parking;
- Establishing a car share scheme for employees and implementing priority parking spaces for car sharers;
- Introducing flexible working arrangements, such as home working and flexitime working;
- Making use of Salary Sacrifice Schemes for bicycles and / or public transport concessions (if available);
- Raising awareness of the health, environmental and cost benefits of walking, cycling and using public transport;

- Raising awareness of public transport serving the site and making public transport maps, timetables and leaflets available to staff and visitors;
- Provide buddy schemes for shift workers who would like to walk to work but their shift finishes late or in darkness;
- Provide a guarantee of transport in the event of an unforeseen domestic need.

Residential Travel Plans:

Residential Travel Plans should outline measures aimed at influencing the travel behaviour of new home owners to, from and within the development. These could include:

- Aiming to ensure that the design of the development takes into account the objectives of the Travel Plan;
- Distributing a welcome pack to new residents with maps showing local walking and cycling routes and local public transport maps, leaflets and timetables;
- Where appropriate, providing a car club vehicle(s) for residents to use;
- Establishing a residents' car share scheme;
- Providing residents with 1 months' free public transport tickets or a voucher for discounted walking or cycling goods.

Leisure Travel Plans may also be required for developments likely to generate a large volume of visitor journeys. Measures could include innovative marketing campaigns and initiatives for encouraging sustainable travel, such as limiting, or charging for, car parking, and ensuring the development is well served by walking, cycling and public transport links.

Who is responsible for the Travel Plan?

The development, implementation, management and monitoring of a travel plan is the responsibility of an individual organisation. This can fall within the remit of a dedicated travel plan officer who is employed for this specific purpose, or be included as one role within an employee's existing position.



Due to resource constraints the latter predominates at present in both the public and private sector.

Where a number of organisations are part of the same travel plan, as in the case of a Business Park for example, a Travel Planning Group is often established to progress and oversee the implementation and management of the travel plan e.g. The Dumfries South Travel Planning Group involving Dumfries and Galloway College; NHS; University of Glasgow; University of South West Scotland; DGC and Crichton Development Company.

What can the Council do to help?

While the development and implementation of a travel plan is the responsibility of the organisation itself, the Council can provide guidance and assistance. Dumfries and Galloway Council will be fully supportive of your Travel Plan as it is an important element in reducing the impacts of the private car, whilst offering improvements to public health and environment.

For example:

- As part of its "GoSmart" sustainable travel initiative the Council have advisors that can offer a range of information and materials to provide all that is needed to try out sustainable ways of travelling, such as details of car sharing schemes, information on the "Bike2Go" cycle rental scheme, cycling route maps, bus times, walking routes and so on (see Useful Information below for contact details);
- You will need to liaise with the council to identify the opportunities that exist for off-site infrastructure changes e.g. improved cycle routes;
- The Council can provide timetable / bus route information and contact details for bus operators serving your site;
- Assistance in liaising with operators to encourage changes in routes which would benefit both your organisation and the bus operators;
- Whilst the monitoring of a travel plan is the responsibility of the organisation

involved, intervention by the local authority (predominantly when linked to a planning condition or agreement) is often required to ensure that the travel plan is being undertaken as agreed and that it is achieving its aims.

Enforcement

Travel plans can either be introduced by organisations on a voluntary basis, or in some cases they can be required as a result of an agreement or planning condition. That is, they may be developed voluntarily through pressures on an organisation such as parking constraints, local congestion or staff recruitment issues or a combination of these pressures; or alternatively, travel plans may be required through regulatory control. The latter may be through Section 75 of the Town and Country Planning (Scotland) Act 1997, usually referred to as a 'Section 75 Agreement', or as a planning condition through the development control process as a result of an organisation wishing to develop an existing or new site for occupation.

Bonds will be required (for example via the Section 75 Agreement) to enable previously agreed measures to be implemented if the development does not meet agreed targets or milestones. These measures would seek alternative means of achieving the targets set, or if the target has been shown to be unachievable, to fund measures which take account of the higher than anticipated traffic generation of the site.

The bonds may also be triggered by progress reports not being submitted. Without the progress reports the Council will be unable to assess whether agreed targets and / or milestones are being met. The implementation of all travel plans will be expected to have commenced – and the initial milestones achieved - prior to the opening of the development.



Monitoring and Evaluation

Travel Plans should identify effective monitoring techniques and these will be agreed with the Council. The Council will request updates from developers every two years on the implementation of the Travel Plan.

Legal Agreements may be required or planning conditions may be placed on planning applications to bind the targets set

out in the Travel Plan and set the arrangements for monitoring, enforcement and review.

It is also important for a developer to have a backstop date if agreement on targets and delivery is to be achieved. The enforcement and monitoring programmes must reflect this.

Other useful information

Cycle to Work scheme:

Cycle to work schemes allow employees to get a tax-free bicycle, saving on average about half the cost. It is free to join for employers and can be administered online.

www.cyclescheme.co.uk

Dumfries and Galloway car sharing website:

www.dgtripshare.com

Dumfries and Galloway Council's sustainable travel team:

www.dumgal.gov.uk/index.aspx?articleid=2625

email: pe.travel.info@dumgal.gov.uk

Dumfries and Galloway GoSmart:

Information on sustainable travel in the region can be found at: www.gosmartdumfries.co.uk phoning free on 0800 0234 586 or emailing gosmart@dumgal.gov.uk

Energy Savings Trust offers assistance in producing travel plans: www.energysavingtrust.org.uk/scotland/Organisations/Transport/Travel-planning

Public Transport information:

www.travelinescotland.com

Scottish Government 'Scottish Planning Policy' 2014:

<http://www.scotland.gov.uk/Resource/0045/00453827.pdf>

Scottish Government's on-line travel planning tool:

www.chooseanotherway.com



Appendix 1 Travel Plan suggested content

1 Cover page

- Development name (if known), or site name and occupier name (if known);
- Full address of the development;
- Contact details for the person responsible for preparing the travel plan.

2 Context

- Brief description of the nature and context of the proposed development e.g.; number of units, floor area, number of cycle and car parking spaces etc, timescales for occupation and details of any phasing of development;
- Details of associated travel including number of staff expected on site, numbers of visitors, residents and key details about delivery and servicing activity;
- The scope of the travel plan and who it will apply to (e.g. employees, visitors, those making deliveries and servicing the site);
- Benefits of a travel plan for the site – including benefits of managing deliveries and servicing.

3 Site assessment

- Location of the development including boundaries and access points for all transport modes including delivery / servicing access points (include maps and site plans where useful);
- Pedestrian and cycling access points and routes to the site, to local transport and other amenities (including consideration of quality and availability);
- Organisational policies and other initiatives that will influence active travel and public transport use e.g. tax-free cycle purchase schemes, cycle training etc.;
- Car-related initiatives in place e.g. car park management policies, car clubs in the local area, car sharing, pool cars etc.;
- Public transport facilities and services including routes, hours of operation and service frequency, quality of stops etc.;

- Initiatives / work practices that reduce the need to travel or encourage sustainable travel e.g. home working, teleconferencing, flexi-working, sustainable business policy;
- Amenities / facilities in the surrounding area that can be reached by walking / cycling, reducing the need to travel by car e.g. at lunchtime;
- Provision for disabled site users.

4 Travel survey

- If not yet undertaken, details as to when surveys will be undertaken (usually within six months of occupation or at 75% occupancy);
- Baseline travel data based on travel survey data if there are existing site users or (where there are no existing site users) on the transport assessment.

5 Objectives

- Cover a range of outcomes e.g. environmental, health etc.;
- Relevant to desired policy outcomes within the Local Development Plan and associated Supplementary Guidance;
- Relevant and linked to the specific context of the site;

6 Targets

- Should be “SMART”, specific, measurable, attainable, realistic and timebound, and should link to the objectives of the travel plan;
- Should enable measurement of success in achieving objectives of the travel plan;
- Enable enforcement.

7 Travel plan management

- Identify a travel plan co-ordinator including their name where possible. In the absence of this, a nominated point of contact should be provided;
- Clear roles and responsibilities (which may include management of deliveries and servicing, provision of personal travel planning advice, preparation and distribution of welcome packs, travel plan monitoring etc);



- Identify any other individuals involved in managing all initiatives (including deliveries and servicing);
- Identify how much time will be dedicated by the co-ordinator to the travel plan;
- Clear marketing activities and who will carry these out.

8 Measures

- Clearly contribute to achieving the targets and meeting the objectives of the travel plan and are specific to the site;
- Take account of future propensity for walking and cycling (active travel);
- Physical and infrastructure provision e.g. secure bike parking, showering and changing facilities, safe and accessible routes;
- Consider organisational and other policies that encourage walking and cycling e.g. cycle mileage for business travel;
- Initiatives encouraging use of public transport;
- Details of how parking will be managed and restrained, if applicable;
- Disability Discrimination Act compliant minimum of one disabled parking bay and how this will be enforced;
- Car sharing, car clubs, cycle clubs and cycle vouchers and provision of electric vehicle charge points where appropriate;
- Working practices which reduce the need to travel including home working, teleworking etc. or an appropriate business travel policy.

9 Monitoring and review

- Clear monitoring programme detailing what and how frequently surveys will be undertaken, by whom, and how they will be reported;
- Year one (baseline), three and five monitoring periods.

10 Action plan

- Include short / medium / long-term actions and timescales and responsibilities;
- Concise and focused on delivery and implementation of the travel plan;
- All measures / initiatives to be introduced should be summarised, including marketing activities and those relating to monitoring.

11 Securing and enforcement

- Measures in place to ensure the travel plan is implemented effectively e.g. Section 75 Agreement etc.;
- Relevant excerpts from the agreement or planning conditions and how the travel plan is consistent with them.

12 Travel plan funding

- How the travel plan will be funded;
- A budget for each element of travel plan delivery including marketing and measures;
- How the travel plan coordinator and the monitoring programme will be funded.