

To produce a Travel Plan (TP) for a speculative development where the end occupiers are still unknown and to still satisfy current TP standards, essential to secure planning permission by satisfying any relevant conditions, is a huge challenge. It is more than likely that you will need to first develop an interim or “preliminary” TP that can then be adapted as site users take up occupation. The following guidance sets out the 11 key parts any TP should contain. In clear text, your TP must include all those items listed under the “essential” column, though it is hoped that some, if not all of those items shown under the “desirable” column could also be incorporated. There is further information and download guidance available on the “Travelwise” website at www.wiltshire.gov.uk/transport including a Workplace TP checklist for when it is time to convert your preliminary TP into a full TP.

Travel Plan Element	“What we basically want”	Essential	Desirable
<p>1. INTRODUCTION: Description of the location, size and type of site, both current and future, including setting the context of the site in relation to the local area</p>	<p>“Tell us about your organization, your role in the development and the TP, the existing site, and what is proposed – imagine you’ve never been there before and no nothing about it, or you”</p> <p>“Is this a full TP? Is it a preliminary TP? If so, when will the full TP be produced, and by whom?”</p>	<ul style="list-style-type: none"> - Rationale behind the development / evidence for need - Construction programme (works commence & end?) - What businesses could occupy the site – if you know, state who, what they do (if unusual, explain), likely workforce size, & when occupying? - Describe the location in relation to surrounds, including proximity to residential areas, roads, bus / train links, cycle / pedestrian links, schools etc. - Will there be any on site facilities provided for new employees / visitors? Describe (e.g. food outlets, shops etc) - Location map and site plan 	<ul style="list-style-type: none"> - Photographs - Any extended / community use of site planned? - If known : <ul style="list-style-type: none"> - staff postcodes of future occupiers - if possible, plot these postcodes onto maps - details of future occupiers’ customers / clients’ locations & their business catchment area - usual opening times, clarifying if these are beyond 8am to 6 pm
<p>2. BACKGROUND: Description of the travel/transport problems/issues faced by the site</p>	<p>TP’s help identify from the start travel issues that affect a site and then identify how these can be overcome without detriment to the existing situation by reducing car use and helping sustainable travel – what issues are there?</p>	<ul style="list-style-type: none"> - Describe the travel issues / problems at the site e.g. isolated, near to rail / bus, busy road, residential area, etc - Outline the facilities you are including in your development, e.g. cycle parking, lockers, restricted quantity of car parking (any reserved / allocated spaces?) – are these available for each unit or for the site as a whole? 	<ul style="list-style-type: none"> - How have these issues been identified? - Any surveys / local consultation? - What consideration has been given to the transport needs of all future staff, visitors, and other site users? Include usual working day as well as journeys made off peak / out of normal office hours - Outline any future development on your site or near to it that might occur - Do you have a track record in TP’s / sustainable travel?
<p>3. SURVEY: To establish how all users could travel to/from the site</p>	<p>If no / less than 30% of occupiers are unknown, a survey must be scheduled for 3 months after 1/3 of units are occupied or as soon as 50 staff are on site, then repeated after 1,3 and 5 years covering all those on the site at that time.</p>	<ul style="list-style-type: none"> - Survey of how staff, clients, customers, visitors usually travel to the site - Survey of how staff, clients, customers, visitors would like to travel to the site - Home post codes - Report data as numbers & percentages <p><u>Notes:</u></p> <ol style="list-style-type: none"> I. Aim for as representative a survey as possible of staff, visitors, clients etc, & from all the occupiers. II. Use the same survey & technique each time to measure change over time. III. Report total employees, the number surveyed & the number responding. 	<ul style="list-style-type: none"> - More detailed questionnaire - allows for greater identification of issues, barriers, possible solutions and innovative ideas e.g. ask ‘distance travel to site’, link post codes to mode of travel (actual & preferred) to identify potential modal shift, ask what would get them to use bus / train / walk / cycle / car share, etc..

Travel Plan Element	Overview	Essential	Desirable
<p>4. OBJECTIVES Clearly defined objectives and targets</p> <p>– your preliminary TP may be quite limited, but will be clear on setting out the timescale for development of the full TP and associated survey, monitoring and reporting</p>	<p>“What specifically do you want the TP to achieve in the long run?” & “What specific goals do you want to reach?” e.g. 20% walking to site</p> <p>As a “Preliminary” TP, it sets the tone / spirit for future occupiers to sign up to, in readiness for adopting the full TP</p>	<ul style="list-style-type: none"> - State that a full TP will be developed within 3 months of a survey undertaken (as per Section 3). State by whom. - Clear objectives (i.e. statements of intent – what do we want to achieve?) stated within the text and linked back to the issues identified in the Background (as per Section 2). - Clearly identified targets (i.e. a specific point which we want to reach by a stated time) that reflect the survey data and issues identified, & are linked to the objectives. Must be SMART: Specific Measurable Achievable Realistic Time bound – set a deadline - Nominate an individual within the developer to be responsible for the Preliminary TP and to oversee the hand over of duty to develop a Full TP to responsible person(s) on behalf of known occupiers 	<p><u>NOTE:</u> The duty to develop the Travel Plan should be seen as part of the Lease / Deeds legal duties, in a similar light to contributions towards communal issues that may exist.</p> <p>All potential occupiers / users of the site must be made aware of the principal of the preliminary TP when enquiring about occupation, and should receive a copy as part of their purchase / rental agreement clearly stating their roles and responsibilities and obligations</p>
<p>5. ACTIONS Details of proposed measures</p>	<p>“What specific actions/tasks are you going to take to meet the Travel Plan’s objectives?” For preliminary TP’s, this could be limited to develop & implement a full TP, and to inform potential occupiers</p>	<ul style="list-style-type: none"> - State a programme for developing the full TP, say by whom, when, and how – typically within 3 of the first survey - Outline the developers own information programme regards the TP to potential and actual occupiers / rentals - Starting from Now! (when the TP is approved) - Targets must be agreed with WCC 	<ul style="list-style-type: none"> - Table format covering criteria 5, 6 and 7 i.e. what, when, who is responsible, success criteria measurement, and resource implications - Link actions to specific objectives and/or targets
<p>6. TIMESCALE: Detailed timetable for implementation</p>	<p>“When is each action going to be completed and/or undertaken by?”</p>	<ul style="list-style-type: none"> - Clearly state when the action/ activity will be completed and/ or undertaken (mm/yy) 	<ul style="list-style-type: none"> - Avoid unclear or open statements such as ‘ongoing’ - Identify the risks which would prevent implementation
<p>7. RESPONSIBILITY: Clearly defined responsibilities</p>	<p>“Who is going to make sure each action happens?” “Who has legal responsibility for completing legal obligations?”</p>	<ul style="list-style-type: none"> - There needs to be a specific role assigned to each action/ task listed – e.g. TP Coordinator, Facilities / Site Manager, CEO - List all working on developing and implementing the preliminary and full TP 	<ul style="list-style-type: none"> - Named individuals - Identify a lead person within the developer organization to liaise with external bodies and to work with the occupiers in setting up their own management structure for overseeing the Travel Plan - Avoid unclear statements wherever possible and always specify named persons / groups, and ensure workloads for actions identified are divided equally
<p>8. CONSULTATION: Evidence that all parties have been consulted</p>	<p>“Show that the TP is the result of joint efforts by individuals and groups from the organization and external groups such as local councils and site neighbours”</p>	<ul style="list-style-type: none"> - Detail how you have sought to find out the opinions and ideas of all those directly affected by the development and its travel - Who was consulted & how 	<ul style="list-style-type: none"> - Findings of detailed questionnaires with potential site users - Discussions with site neighbours - Refer to focus groups involving site users - Letters sent to service / delivery contracts - List members of the TP working group

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<p>9. ON GOING MONITORING: Monitoring and review proposals</p>	<p>“How are you going to track whether the actions undertaken are meeting the TP objectives and targets, and more importantly, your agreed legal planning requirements?”</p> <p>“What are you going to monitor to measure progress?”</p> <p>This is your route to exit your commitment to manage the TP and hand it over to site occupiers</p>	<ul style="list-style-type: none"> - State the mm/yy when your TP’s next survey(s) and review audit will occur - State who (i.e. a specific role) is responsible for ensuring both survey and review will be completed - The TP must include a commitment that the review will consider travel needs arising from any new developments affecting the site including changes in transport provision and occupation of the site 	<ul style="list-style-type: none"> - Include ‘success criteria’ or ‘monitoring indicators’ in a column against each action in the action plan - Make the links to the Business / Corporate / Finance Plan
<p>10. IMPLEMENTATION: The day to day operations of your TP</p>	<p>“Convince the reader that the TP will be implemented day to day / year to year to make a difference to influencing the occupiers of the site and their travel behaviour”</p>	<ul style="list-style-type: none"> - What initiatives / activities will be undertaken to stimulate and ensure occupiers develop & implement the full TP, e.g. site management meetings, newsletters, audits 	<ul style="list-style-type: none"> - Show how the TP will be integrated into other business / organization policies relating to occupiers - Demonstrate how and what savings will be realized from a more sustainable approach to travel collectively by the occupiers
<p>11. ENDORSEMENT: A commitment from your Senior Management to support the principals and goals of the TP</p>	<p>A foreword provided by a figurehead(s) within the organization signing up to the spirit of the TP</p>	<ul style="list-style-type: none"> - A short personal note outlining support for the TP - Dated signatures by key figureheads of the organization and with responsibility for the TP development & implementation 	