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# DEVELOPMENT CONTROL POLICY

## GUIDANCE NOTE 12

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# Travel Plans in Bury

May 2007



This guidance note is primarily aimed at developers, architects and those who intend to submit planning applications which would have significant traffic implications, where travel plans are likely to be required. The contents are as follows:

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## PRE-TEXT

This pre-text to the Development Control Policy Guidance Note No.12 sets out the details of the consultation and publicity steps that were undertaken during the preparation of this Supplementary Planning Document (SPD)

This Supplementary Planning Document (SPD) has been produced in the form of a Development Control Guidance Note. It is intended to support policies contained in Bury's adopted UDP (adopted 31<sup>st</sup> August 1997). This Note provides a more formal basis to advice which is given to applicants on a regular basis and is now a material consideration in the determination of planning applications.

This SPG was approved for a consultation exercise by the Council's Executive on the 10<sup>th</sup> January 2007. This was after a period of internal consultation with Officers in various Sections of the Council. Views were sought from members of the public and private organisations and relevant interest groups over a six-week period (23<sup>rd</sup> January 2007 to 6<sup>th</sup> March 2007). Copies of the Draft SPD were made available for inspection at the planning reception desk and in the Borough's main libraries. Further copies could also be obtained on request and the draft was also made available on the Council's website.

The draft SPD was revised in the light of the comments received through the consultation process. The revised version went to the Council's Executive on the 30<sup>th</sup> May 2007 and was formally adopted.

In accordance with the requirements in PPS12, a Statement of Consultation document was drawn up, which outlined the representations received and the Authorities response to these. This statement is available for inspection on request, together with the adopted version of the SPD.

Any queries you may have regarding this Note, the Bury UDP or Bury's Local Development Framework should be directed to the Planning Policy Team on 0161 253 5283.

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## 1 - INTRODUCTION

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- 1.1 Travel plans play an important role in contributing towards the delivery of sustainable transport objectives, by seeking to achieve an accessible Borough with an integrated transport system.
- 1.2 This Supplementary Planning Document (SPD) provides advice on travel plans and additional information to support the implementation of Policies HT1 and HT4 of the adopted Bury UDP.
- 1.3 In particular, this SPD sets out:
  - ❖ When a planning application for a development is likely to require the submission of a travel plan;
  - ❖ What type of travel plan is appropriate;
  - ❖ The Council's minimum requirements for travel plans;
  - ❖ How the travel plan should be monitored and reviewed; and
  - ❖ Advice on how the travel plan should be secured.
- 1.4 This guidance also contains practical advice on how to prepare and submit a travel plan in order to minimise the risk of delays in the planning process. For more information on points raised in this SPD, please refer to the 'Contacts' section at the end of the document. This guidance may also be used by organisations that take up voluntary travel plans.
- 1.5 The objectives of this SPD are as follows:

Objective A

To reduce reliance on the private car, particularly of lone car occupancy to sites by promoting the use of more sustainable modes of transport.

Objective B

To encourage an integrated approach to land use and development, by improving the accessibility of developments and also the safety of sites.

## 2 - BACKGROUND

### Definition of Travel Plans

2.1 Travel plans comprise a **package of measures and incentives** to assist in managing the transport needs of an organisation or development. A travel plan contains both physical and behavioural measures, providing people with greater modal choice whilst reducing reliance on single-occupancy car travel. A successful travel plan will offer users of a business, organisation or of a particular development a choice of travel modes to and from the site, which encourages more sustainable patterns of movement. Travel plans can be origin based or destination orientated and can address:

- ❖ Commuter journeys (most common target);
- ❖ Business travel;
- ❖ Fleet management;
- ❖ Visitors to sites;
- ❖ Deliveries; and
- ❖ Journeys made from a single origin (for example, homes) to multiple and changing destinations.

2.2 Successful travel plans demonstrate the following characteristics:

- ❖ Effective planning and preparation, particularly at pre-application stage;
- ❖ Partnership working with key stakeholders including Bury MBC, Greater Manchester Passenger Transport Executive (GMPTE) and local transport operators;
- ❖ Methodically researched and designed in line with the specific needs and characteristics of the development and its vicinity;
- ❖ Setting of SMART (specific, measurable, achievable, realistic and time related) targets; and
- ❖ A recognition that the formulation of a travel plan is a **dynamic process, rather than being a one-off document**. The plan should be monitored and altered over time to match the changing circumstances of the site.
- ❖ Include a good marketing strategy which can help improve the effectiveness of a travel plan, e.g. by setting out how you are going to promote a given activity or project.

2.3 The Council has been recognised by the Department for Transport (DfT) as being very successful in working with partners to implement effective school travel plans. This SPD aims to build on this experience and proven success - to implement effective travel plans for other types of larger developments.

## Types of Travel Plans

2.4 There are several types of travel plans, which serve different needs and travel requirements:

- I. **School Travel Plans** encourage staff and pupils to use alternative means of travel to school other than by car. A key objective is to reduce the number of unnecessary car journeys by promoting more walking, cycling and use of public and school transport in partnership with key players.

School travel plans will use multi-agency and local community-support, and will endeavour to improve safer walking and cycling routes to schools. Key Government departments (Department for Transport – DFT and the Department for Education and Skills - DFES) have stipulated that *all* schools need to have travel plans by 2010.

- II. **Residential Travel Plans** are a package of measures designed to reduce the number of car trips generated by a residential development, whilst also supporting more sustainable forms of travel and reducing the overall need to travel. The pattern of journeys originating at home is more varied, with residents having multiple destinations and different needs and travel choices over time. In these cases, on-going management organisation and structure for the travel plan needs to be put into place.
- III. **Umbrella Travel Plans** are utilised where the transport implications resulting from numerous developments on one site cause a requirement for a single travel plan that caters for the whole site. Each occupier and also new occupiers would need to prepare and implement subsidiary travel plans that are appropriate to their particular use and travel characteristics.
- IV. **Interim Travel Plans** are designed to secure a commitment in principle to the eventual implementation of a future travel plan. Interim travel plans should be agreed with the applicant, developer or their agent **before** the planning application is determined. These types of travel plans are more likely to form a part of Section 106 Agreements.
- V. **All other**, predominantly work place travel plans (these are also referred to as 'green', 'company' or travel plans), which contain a package of measures to encourage alternative and more sustainable modes of transport to be used for activities such as commuting, business travel, visitors and deliveries. This may include travel by bus, train, tram, bicycle, motorcycle, walking or car sharing.

## Why are Travel Plans Needed in Bury?

2.5 Car usage in Bury has significantly increased since 1991, and is higher than the national and regional average. As a consequence, traffic growth has increased by 17% since 1988 and continues to rise<sup>1</sup>. Bury also has the lowest levels of walk and cycle to work rates in the North West<sup>2</sup>. These issues have knock on effects, such as higher levels of atmospheric pollution, congestion,

<sup>1</sup> These figures are taken from Bury LDF Sustainability Appraisal Scoping Report, June 2005

<sup>2</sup> Figures from Chartered Society of Physiotherapists, 2004

health problems and increased pressure on land. For example, almost half of all properties<sup>3</sup> in the Borough fall within Air Quality Management Areas (AQMAs). This means that a number of areas have higher than nationally permitted levels of air pollution. This is a major cause for concern, particularly considering that we cannot see the presence or the immediate effects of air pollution. Equally, we need to ensure that the transportation requirements of developments are met in the most sustainable manner possible.

### Benefits of Travel Plans

2.6 Travel plans assist in helping to reduce congestion, traffic-related pollution, traffic collisions and injuries for residents in the Borough. Travel plans are also the most economical, efficient and socially responsible way to solve transport problems. For example, travel plans can offer organisations a range of benefits, including:

- ❖ Saving money, for example, reducing mileage claims and other staff travelling expenses, and the cost of providing and maintaining parking spaces for employees;
- ❖ Generating competitive advantage by helping to improve morale and the health of employees, improving accessibility to the site, promoting the corporate social responsibility (CSR) credentials of an organisation, encouraging flexible working practices and producing a fairer approach to travel subsidies;
- ❖ Improved company image within the local community
- ❖ Reducing congestion on and in the vicinity of the site, particularly during peak times;
- ❖ Reducing energy use/emissions/pollution/improved air quality;
- ❖ Freeing up car parking space for possible expansion;
- ❖ Tackling social exclusion;
- ❖ Recruitment and retention of staff/employees
- ❖ Improving amenity of the site and its immediate surroundings; and,
- ❖ Widening the choice of travel modes for all those travelling to and from the site.

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## 3 - POLICY CONTEXT

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### National Policy

3.1 The need to increase travel choice and reduce dependency on car travel has been established across a spectrum of national planning policy-related publications. Travel planning to date has largely focused on destination travel plans where the aim is to reduce single occupancy car use to a specific destination. Recent Department for Transport guidance has outlined the potential for residential travel plans – which raise a number of new issues because they focus on journeys made from a single origin (home) to multiple and changing destinations. In addition, the Department for Transport published ‘Smarter Choices – Changing the Way We Travel’ focusing on promoting “softer factors” of which travel plans are a key part.

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<sup>3</sup> 46.8% of all properties in Bury fall into AQMAs - these 2005 figures are taken from Bury LDF Sustainability Appraisal Scoping Report, June 2005

## Planning Policy Guidance Note 13 - Transport

- 3.2 National policy guidance specifically relating to transport is contained in Planning Policy Guidance Note 13 (PPG13): Transport (March 2001). PPG13 advises that travel plans should be submitted alongside planning applications that are likely to have significant transport implications (for Bury's thresholds, see Section 4).
- 3.3 Also of importance, it should be noted that the weight which would be given to a travel plan in a planning decision will be influenced by the extent to which it materially affects the acceptability of the development proposed, and the degree to which it can be lawfully secured (para. 91).
- 3.4 However, as PPG13 states, “.....*unacceptable development should never be permitted because of the existence of a travel plan*” (para. 89).

## Regional and Local Policies

### Regional Spatial Strategy for the North West – RSS

- 3.5 RSS which was originally published on 31<sup>st</sup> March 2003 forms current statutory regional planning guidance. It will eventually be superseded by The North West Plan, which is currently referred to as the submitted draft Regional Spatial Strategy (RSS) for the North West of England.
- 3.6 Travel plans support key objective 7 of the adopted RSS, which is “to create an accessible region, with an efficient and fully integrated transport system.”
- 3.7 Travel plans also support the following policies in RPG13:
- ❖ T1 - Integrating Transport Networks in the North West
  - ❖ T4 - Road Safety
  - ❖ T9 - Demand Management

Emerging policies in the draft submitted RSS support demand management<sup>4</sup> measures, such as travel plans as being key to promoting sustainable patterns of travel.

### Greater Manchester Local Transport Plan 2

- 3.8 Greater Manchester's Second Local Transport Plan (LTP2) (2006) sets out a long term vision and transport strategy for Greater Manchester (GM) from 2006/7 until 2010/11. The key problems highlighted that affect Bury include:
- ❖ Congestion across GM, which also affects Bury - a key task is to reduce the number of car commuter trips to main centres by 2011 compared with 2001.
  - ❖ Air quality is a problem in GM and Bury, particularly along motorways and radial routes.
  - ❖ The need to encourage walking and cycling.

<sup>4</sup> 'Demand management' are measures which attempt to pre-dominantly reduce road congestion, such as parking policies

- 3.9 LTP2 sets out intentions to continue to encourage and support employers to develop workplace travel plans where this would have the most impact on local traffic. Where appropriate, developers are to be encouraged to implement residential travel plans.
- 3.10 Travel plans also support the Greater Manchester Integrated Transport Strategy (GMITS) which covers transportation issues until 2020. In particular, this document notes that “..for the large number of shorter trips of less than 2 kilometres the emphasis will be on promoting measures to increase the attractiveness of walking and cycling. For longer trips....heavy rail, light rail and bus all have an important role”.

### **Bury Unitary Development Plan**

- 3.11 Bury’s Unitary Development Plan (UDP), which was adopted in 1997, contains policies that support the principle of sustainable development and initiatives such as travel plans.

Policy HT1 – A BALANCED TRANSPORTATION STRATEGY states:

*“The Council will promote a balanced transportation strategy by ensuring that there is a co-ordinated approach to the formulation of policies and proposals for the alteration, upgrading or improvement of the transport network. This can be achieved by:*

- a) implementing measures designed to increase the attractiveness of public transport as a viable alternative to private transport;*
- b) facilitating better interchange between different modes of transport whether public or private;*
- c) improving the accessibility of public transport to those travellers whose mobility is impaired;*
- d) diverting road traffic, especially through traffic, especially through traffic, onto major roads;*
- e) improving the capacity of major roads by selective improvement, also aimed at reducing road traffic accidents. “*

Other relevant policies include:

- ❖ Policy HT4 – new development;
- ❖ Policy HT3/1 - seeking to provide schemes to assist bus movement;
- ❖ Policy HT3 - encouraging use of public transport
- ❖ Policy HT2/3 – Improvements to other roads; and
- ❖ Policies EN7, EN7/1, EN7/2 – relating to pollution.

- 3.12 These policies will be updated and replaced by policies contained in Bury’s Local Development Framework, which will continue to support the principle of working towards sustainable travel initiatives such as travel plans.



## 4 - WHEN IS A TRAVEL PLAN REQUIRED?

- 4.1 Developers are encouraged to engage in pre-application discussions with the Council at an early stage, to determine whether a travel plan is required and what type/content may be appropriate. Early engagement with the Council is important as it may influence the design of any final scheme.
- 4.2 It is often the case that Transport Assessments<sup>5</sup> are required, travel plans emerge through the process of considering whether Transport Assessments are required. New guidance on Transport Assessments<sup>6</sup> has recently been produced and applicants should refer to this document for further information on transport assessments. Where Transport Assessments are required, Travel Plans will now be required also. The flow chart included in Appendix 1 of this SPD maps the process as to when/how travel plans and transport assessments may be required.
- 4.3 It is important that travel plans are not considered as an isolated component of the development control process, but that they are considered as an implicit component of a development's movement framework. Travel plans are one means of facilitating and accommodating movement that are a part of the wider spatial and urban design framework.
- 4.4 However, it needs to be noted that as stated in PPG13, *unacceptable development should never be permitted* because of the existence of a *travel plan*.

### Instances when Travel Plans *will* be required

- 4.5 Travel plans should be submitted in conjunction with planning applications which are likely to have significant transport implications. Alternatively, it may be possible to attach a condition to the planning consent, or in some instances, the travel plan would be subject to a S.106 agreement. You are advised to check with the Planning Department during pre-application discussions, as to the best approach for your proposal. Points 4.6 – 4.10 below demonstrate instances where travel plans will be required, including those for:
- **Major developments** comprising employment, shopping, residential, leisure, education, hospitals and services. Major development exceeding the size thresholds set out in the table below will be required to submit a travel plan along with their planning application.

<sup>5</sup> The thresholds for TAs can be found in 'Guidance on Transport Assessment' – see below

<sup>6</sup> Please refer to Department of Transport, 'Guidance on Transport Assessment', 2007 for further information on the requirement for a Transport Assessment.

**Table 1: Instances where a travel plan will be required**

New Development/Change of Use	Threshold
Food Retail	>800 sq m
Non food retail	>1500 sq m
Cinemas and conference facilities	>1500 sq m
Leisure facilities (other than cinemas, conference facilities and stadia)	>1500 sq m
A2/B1 Offices, light industry and research and development	>2500 sq m
D1 Higher and further education, health facilities	>1000 sq m
Residential developments	>80 units
Schools	All
Other development	Discuss with local authority

- 4.6 **Smaller developments** comprising employment, shopping, residential, leisure, education, hospitals and services which would generate significant amounts of travel. This would particularly be the case where developments are located in, or near to, Air Quality Management Areas (AQMA); and in other locations where Bury has set out local initiatives or targets contained in the Local Transport Plan for the reduction of road traffic, or the promotion of public transport, walking and cycling.
- 4.7 For new **residential developments, where there are 80 or more dwellings** or where traffic generation is more than 500 person trips per day (as detailed in the above table for major developments). Even where alternative modes are not readily available, research indicates travel plans can achieve modal shift away from car use.
- 4.8 All new and expanded **school facilities** should be accompanied by a school travel plan which promotes safe cycle and walking routes, restricts parking and car access at and around schools, and includes on-site changing and cycle storage facilities.
- 4.9 It might be appropriate for travel plans to be requested where they would help to address a particular **local traffic problem** associated with a planning application, which might otherwise have to be refused on local traffic grounds.
- 4.11 Where there is **no requirement to produce a travel plan** for your development after reading paragraphs 4.5 – 4.10, developers may still wish to produce a travel plan or implement certain measures for the users of their development. Many of the benefits of travel plans outlined in paragraph 2.6 may still apply. The appointment of a travel plan co-ordinator within the company or specialist consultancy on a short term basis can assist with the drawing up of personal travel plans for employees. Appendix 2 provides useful information on ‘hard’ and ‘SMART’ (Specific, Measurable, Achievable, Realistic and Time-related) Travel Plan measures/actions which may be suitable for incorporation into your development or the organisation itself, even if you do not wish to undertake a full travel plan.

## Speculative Developments

- 4.11 **Speculative Developments** - Where future occupiers are unknown, the Council may require a commitment, in principle, to the eventual implementation of a travel plan. In such cases an Interim Travel Plan should be drawn up, which includes all necessary measures to ensure its effectiveness when implemented. The Interim Travel Plan would remain the developer's responsibility until it is legally passed to the occupier, whether the occupier rent, leases or buys all, or part of, the development. The implementation of a travel plan would then be the responsibility of the end occupier. Travel plans can be implemented through planning conditions or through Section 106 agreements (see 'Travel Plans and the Planning System Section'). For an example of the type of clauses that are likely to be included in Section 106 agreements, see Appendix 4.
- 4.12 **Interim Travel Plans** should include as much detail as possible at the earliest stage. The transport assessment may allow the setting of targets, site layout and design can anticipate travel needs and some hard measures, such as cycle parking facilities and shower & changing rooms can be implemented prior to occupation. The commitment to appointing a travel plan co-ordinator is encouraged at this stage. Further details on the role of a travel plan co-ordinator can be found in Appendix 3 of this document. It is important to minimise any delay in implementing the Travel Plan after occupation in order to reduce the opportunity for less sustainable travel habits to develop.
- 4.13 An example of the process for a speculative development which involves the use of an interim travel plan is given below:

<b>Stage 1</b>	Developer submits an interim travel plan (covering key elements for the final travel plan), which has to be approved by the Council before progression to stage 2. It is important to include as much information as possible at this stage.
<b>Stage 2</b>	Development begins.
<b>Stage 3</b>	Occupier moves onto site. The occupier carries out staff travel surveys within three months of occupation.
<b>Stage 4</b>	Submission and approval of final travel plan within six months of occupation. This may include a revised set of modal split targets if appropriate. These must then be approved by the Council.
<b>Stage 5</b>	Implementation of final travel plan within 9 months of occupation.

## Outline Planning Applications

- 4.14 Any approval granted for outline planning permission where a travel plan may be required will be conditioned so that subsequent reserved matters are required to provide travel plans that encourage alternative and sustainable transportation modes other than the private car for the users/occupiers of their new development.

- 4.15 Where there are proposed changes to an original planning permission (where previous permissions were below the threshold travel plan requirement, or the revised proposal will now generate significant levels of traffic), applicants should be aware that this may also require changes to any planning condition and/or agreements.

### Extensions

- 4.16 It is recognised that some existing premises can develop incrementally via extensions over time, which can influence the transportation impacts of a development. Whilst the impact on local traffic should be considered, as a guide, a travel plan will be required for:
- Any application to increase floorspace by 10% or 1,000 m<sup>2</sup> (whichever is lower).
  - Any application to increase parking by 20% or 25 spaces (whichever is lower).
- 4.17 When an extension would be large enough to create significant numbers of users and have significant transport implications, but the business does not have a travel plan in place, the Council may then request a travel plan via a planning obligation (also referred to as ‘Section 106 Agreements’).
- 4.18 Tests relating to the appropriate use of planning obligations (as set out in Department of Environment Circular 05/2005) will be adhered to when considering whether a travel plan is required for the whole organisation when a proposal relates to an extension.

### Additional travel plan requirements will vary according to the type of development:

#### Cumulative Development

- 4.19 Where several developments occupy one site, the cumulative impact upon traffic may warrant the requirement for an ‘umbrella’ travel plan for the entire site (see point 2.3). In such cases, the Council would require each occupier and new occupiers to prepare and implement subsidiary travel plans as appropriate to their use and travel characteristics. It is recommended that umbrella travel plans be administered by a site manager/agent who represents the interests of all parties. Additional ‘subsidiary’ travel plans *may* be required in respect of sub-areas, depending on circumstances.

#### End occupier(s) known, new development

- 4.20 The occupier should produce a travel plan for submission with the planning application. This is because a decision usually cannot be made on the planning application until the local planning authority is satisfied with the provision made for a travel plan. It should subsequently be **implemented** within 6 months of the commencement of occupation. It is advisable for applicants to discuss travel plan requirements with the Council **well in advance**.

## **Existing occupier extending on site / constructing new premises in the Borough**

- 4.21 The organisation requiring the development should ideally have an established travel plan, or develop one prior to submitting the planning application. If this is not the case, the occupier should produce a travel plan when required by the Council (commencement of development or occupation may not be permitted unless a travel plan has been approved). It should subsequently be implemented within three months of occupation of the new site / extension. It is advisable for applicants to discuss travel plan requirements with the Council well in advance.

## **Schools**

- 4.22 The Department for Transport and Department for Education and Skills have set a target that all schools are required to have school travel plans by 2010. To support this, all schools are expected to develop a school travel plan in conjunction with a planning application. Where schools are moving onto new sites sustainable access to the site should have been a prior consideration and a travel plan initiated.

## **Residential**

- 4.23 Residential travel plans differ from workplace, school and other institutional travel plans in that they deal with a more varied pattern of journeys from the place of origin. They also generally require that an ongoing travel plan management organisation and structure needs to be put in place, as there is often no single company or institution to continue or co-ordinate travel plan implementation.
- 4.24 The type and content of residential travel plan that is required and deliverable will be dependent on the type, location and scale of the residential development and whether it is part of a mixed use development. Residential travel plans can vary from a package of measures (including site layout and design measures) up to a formal and comprehensive travel plan or framework travel plan where there are subsidiary plans for different uses.
- 4.25 Generally residential travel plans would be secured through the planning process with a Section 106 Planning Agreement. Circular 05/2005 includes provisions that facilitate the securing of maintenance payments, contributions to relevant but larger travel plan schemes or travel plan funds (e.g. for a travel plan co-ordinator).

## 5– PRODUCING A TRAVEL PLAN

- 5.1 There is a recognised procedure for producing and implementing a travel plan, starting with an assessment of current travel patterns and transport provision, and identification of measures and actions necessary for the plan (see Appendix 2 for further detail). It is recognised that a travel plan will be unique to a particular site and that a variety of initiatives may be adopted. Travel plans should encourage the use of sustainable transport, addressing national, regional and local policies, the Local Transport Plan and the Transport Assessment.
- 5.2 The production of travel plans will ideally involve a partnership approach including; the applicant, the Council's Travel Plan Co-ordinator and public transport providers. Other third parties may also be involved in its development. A site-based Travel Plan Co-ordinator may also be appointed at an early stage and they would play a central role. An indicative comparison of this role and that of the Council Travel Co-ordinator is included in the table below:

Role of Council's Travel Plan Co-ordinator	Role of Site-based Travel Plan Co-ordinator
Information and support during preparation	Preparation of the site Travel Plan
Local data and analogous information	Implementation of the site Travel Plan
Monitoring of effectiveness of all Travel Plans	Marketing of Travel Plan and support to employees, residents, occupiers etc.
Feedback within Council of emerging data	On-going collection of monitoring data
On-going communication with site-based travel plan co-ordinator	Review and revision of the site Travel Plan
	On-going liaison with users and Council travel plan co-ordinator
	Facilitate handover of TP management

**Table 2: The role of a Travel Plan Co-ordinator**

- 5.3 The remainder of this section provides useful information on the procedures for workplace, school and residential travel plans. Additional guidance for school and residential travel plans is contained in Section 7.

### 5.4 Workplace Travel Plan

#### Step 1 – Appoint a Travel Plan Co-ordinator

It is recommended that the Developer/applicant supply the Council with the name of an appointed Travel Co-ordinator from the organisation responsible for the success and running of the travel plan. Dependent upon the scale and nature of an organisation, this may be a full time post or may involve extending the job profile of an existing employee (see Appendix 3 for a role

description). In the case of speculative developments, the lease/sale contract must include provision for handing over the responsibility of travel plan implementation to the new co-ordinator. Good communication is essential for effective implementation.

## **Step 2 – Site Audit**

This is an essential part of preparing a travel plan. It is a tool for methodically assessing transport facilities on the site and transport links to it. It should look at pedestrian access (is the pedestrian network well-lit, clear of overgrown bushes, etc.), cyclist access and parking, public transport provision (services, frequencies and the quality of the waiting environment), and car park provision (number of spaces for disabled, visitors, employees, etc.).

## **Step 3 – Survey**

A survey to discover travel habits of users of the site (usually staff but may include others such as patients/students, hereon referred to as staff), should be undertaken. An example of the types of questions that may be included in travel plan survey are given in Appendix 5. The aim of the survey is to collect data on current transport methods and find out which incentives to adopt alternative modes would be acceptable and likely to be most effective.

## **Step 4 - Drafting the Travel Plan**

The travel plan can then be drawn up, with targets and relevant measures, based on the survey data collected. Further information on the content of this is provided in Section 6 below.

## **Step 5 – Submission and Evaluation of a Travel Plan**

The finalised or framework travel plan should be submitted with the planning application and will be considered as part of the determination of the application. A copy should be sent to the Planning Case Officer and a copy direct to the Council's Travel Co-ordinator. It will be evaluated by the Council's Travel Plan Co-ordinator, using the DfT's Travel Plan Evaluation Toolkit. The Council will use this toolkit to help assess whether the proposed travel plan is likely to be successful.

Travel plans are usually implemented via Section 106 Agreements of the Town and Country Planning Act 1990. A travel plan that is required as a condition of planning consent can be monitored and enforced by the Planning Authority. Further information can be found in section 9 of this SPD.

## **Step 6 - Monitoring and review**

A travel plan is an evolving process, rather than a one-off document. Consequently, it should be monitored on an annual basis, and evaluated every three to five years (as a minimum) to assess its effectiveness.

## 5.5 School Travel Plans

The stages undertaken in developing a school travel plan are similar to those outlined above. However, there are some differences, which are set out below. Where schools are new and in new locations consideration should have already been given to ensuring the site is accessible. For more information, please refer to the Council's Schools Travel Advisor (see 'Contacts').

- ❖ *Travel Plan Working Group*  
A working group including the 'school champion' (someone who will champion the travel plan and ensure that it is progressed) needs to be set up involving stakeholders, the head teacher, PTA members, etc.
- ❖ *Consultation*  
Parents and local residents should be consulted to establish what travel issues exist. Involve other users e.g. staff and community in order to address their travel needs.
- ❖ *Research*  
Research needs to be carried out, including a recent pupil travel survey and a 'route audit' to see how safe walking and cycling routes to the school are. The travel survey/questionnaire should identify how children travel to and from school, how they would like to travel, and what barriers prevent them from doing so. The completion of a staff survey is recommended by the Department of Transport (see Appendix 4).
- ❖ *Targets*  
Develop clear objectives that link to defined issues, and targets that reflect the survey data and identified issues.
- ❖ *Draft school travel plan*  
In drafting the plan include a range of measures that are most likely to be a success as determined by the research stage, objectives and targets. Prepare an action plan.
- ❖ *Submission of travel plan*  
The school travel plan needs to be approved and countersigned by:
  - The Chair of Governors at the school.
  - Head of Education
  - Borough Engineer
  - Any other relevant body involved (such as Greater Manchester Police).
- ❖ *Monitoring and review*  
Monitoring arrangements need to make links with the school development / improvement plan. The travel plan must include a commitment that the review will consider pupil travel needs arising from new developments in Education and Transport provision, and that the travel plan will be revised to take account of these as necessary.



## 5.6 Residential Travel Plan

The stages undertaken in developing a residential travel plan are similar to those conducted whilst producing a workplace travel plan (see above). However, there are some differences. As with school travel plans an assessment of accessibility should have been undertaken when the site was allocated.

- ❖ *Location*  
The location of the development in relation to facilities and services, the site layout and design, and uses provided within the development will be particularly crucial to the success of a residential travel plan and must be considered early in the process.
- ❖ *Local audits*  
A wide range of data on the likely needs and travel patterns of the occupiers of the development will be needed in order to prepare the travel plan; this will necessitate the use of accessibility audits and other baseline data. Future travel patterns may also be predicted using analogous information about similar nearby developments.
- ❖ *Targets*  
Targets need to demonstrate positive change over what would be seen if there was no travel plan, generally based on the LTP Transport Assessment process.
- ❖ *Management Arrangements*  
Mechanisms to encourage sustainable travel patterns and to ensure the long term delivery of the travel plan need to be built into the travel plan from the beginning.
- ❖ *Draft Residential Travel Plan*  
The draft travel plan is likely to have a wide range of measures and possibly more 'contingency' arrangements in order to allow for future flexibility as occupiers change.
- ❖ *Submission of the Residential Travel Plan*  
As for Workplace Travel Plans.
- ❖ *Monitoring and Review*  
As for Workplace Travel Plans.

## 5.7 Travel Plans for Speculative Development

Travel Plans for speculative developments (see 4.17) will not need to go into the detail listed above. However, they should include the background, draft objectives and hard measures to be put in place during the build of the development and measures that will be implemented post occupation. There should be an undertaking to produce a final travel plan, with targets based on staff survey results, once the site is occupied. Developers will be expected to demonstrate commitment to appointing a travel plan co-ordinator.

## 6- GENERAL CONTENT OF TRAVEL PLANS

6.1 Table 3 below displays the content necessary in producing a quality and effective travel plan. Further information on the measures/actions (stage d) can be found in Appendix 2. Information on the monitoring and evaluation of travel plans is provided in Sections 8 and 9.

**Table 3: Components of a Travel Plan**

<b>a. Background</b>	Explaining site, location, numbers of people using the site (employees and visitors), measures already in place, current share of travel methods and reason for producing the plan. Data should also be included from the site audit and staff travel survey (noting general trends and the baseline modal split).
<b>b. Scope</b>	Identifying the travel elements of the organisation's activity (commuter journeys, business travel, customer access, deliveries, fleet management, nature of work and hours of business, and/or other issues).
<b>c. Objectives</b>	Firm objectives stating what the plan is trying to achieve should be set out clearly. These may include reduction in commuters driving alone to the site, reduction in car trips to/from the site, increase in public transport use, potential for freeing up of car parking space for later development, improving sustainable access etc.
<b>d. Measures / Actions</b>	Detailing the proposed actions and measures for achieving the stated objectives. This section should also note how the travel plan is to be promoted and communicated to employees, visitors (if appropriate), etc.
<b>e. Targets</b>	Identifying targets against which the effectiveness of each measure will be reviewed. The setting of targets is essential. These need to be linked to the objectives of the plan and reflect policies and the transport assessment. They also need to be SMART (Specific, Measurable, Achievable, Realistic and Time-related). There are two types of target; modal share (for example, reduce the number of people driving to work alone by 10% of the modal share by April 2007) and milestones (for example, provide cycle parking for 20 bicycles by a given date). Targets should be approved by the Council and link into the Transport Assessment.
<b>f. Action Plan</b>	This will outline WHAT actions will be taken, WHEN they will be delivered and WHO is responsible for their delivery. In most cases this will be the Travel Plan Co-ordinator. Council and designated site Travel Plan Co-ordinator partnership working is very beneficial when developing a travel plan. Senior managers need to agree and 'sign-off'

	the plan. The Action Plan should also include <i>contingency arrangements</i> . For example, there may be situations where an agreed measure cannot be implemented or where a measure may not be needed unless a particular problem arises. Similarly, it may be possible to anticipate circumstances in which a target cannot be achieved. Future review and enforcement will be more straightforward if contingency arrangements can be built into the travel plan so that acceptable alternative approaches are identified.
<b>g. Monitoring</b>	Setting out arrangements for the review and monitoring of the plan on an ongoing basis to determine whether objectives of the travel plan are being met in line with any Section 106 Agreement. More information is given under Section 8 of this document.
<b>h. Promotion</b>	Noting how the plan and measures will be promoted to staff and customers.
<b>i. Evaluation</b>	It is important to set up and evaluate the proposed Travel Plan prior to its agreement. All Travel Plans should meet the <b>TRACES</b> evaluation criteria (see Glossary).

**Table 3: Components of a Travel Plan**

- 6.2 It is important that measures to meet stated objectives are set out in travel plans as fully as possible, because these will determine the potential of the plan to bring about modal shift. Assessment of the travel plan will be based upon its potential to lessen the transport implications of the development and bring about a change in modal share.
- 6.3 Local circumstances will vary but the choice of measures must work together as a package – some measures and the way they are structured could undermine or increase the success of others. Some may be more effective than others in certain situations. The most effective travel plans contain a mixture of measures to develop alternatives to the car and measures to discourage unnecessary use of the car, along with incentives.
- 6.4 It should be noted that, when work place travel plans are being drawn up, developers should ensure that the final travel plan that they submit meets the minimum standards that are outlined above. The standards tie in with the On TRACK Bronze Award (see [www.travelplans.org.uk](http://www.travelplans.org.uk) for details).

## 7 - ADDITIONAL INFORMATION FOR SPECIFIC TRAVEL PLANS

Sections 5 and 6 provide useful guidance for drawing up travel plans. This section contains additional guidance for the school and residential of travel plans.

### Additional Information for School Travel Plans

7.1 The Department for Education and Skills has stated the minimum requirements for a school travel plan should be:

- ❖ A brief description of the location, type and size of school.
- ❖ A brief description of why the travel plan is being prepared, covering the types of transport / travel issues faced by the school / cluster of schools. This should include all pupils' transport needs: journeys to and from school at normal start / finish times, journeys to attend pre and after-school events, journeys made during the school day to attend activities at other locations and staff/community travel needs.
- ❖ The results of research, including an up-to-date survey to identify:
  - a) how children currently travel to / from school, and
  - b) how they would like to travel.
- ❖ Clearly defined objectives and clearly identified SMART (**S**pecific; **M**easurable; **A**chievable; **R**ealistic; **T**imed) targets, including some that look 2-3 years ahead.
- ❖ Details of proposed measures that will achieve objectives and targets.
- ❖ A clearly defined yearly Action Plan (similar to that for Workplace Travel Plans) that identifies the specific person or body responsible for each action, which may be the School Travel Plan Working Group, STP co-ordinator, school champion, school council advisor, senior management team, head etc. This should include a specific timetable for implementation of the school travel plan.
- ❖ Evidence that all interested parties have been consulted, including who was consulted and how.

### Additional Information for Residential Travel Plans

7.2 Guidance on travel plans in new residential development was published in late 2005 ("Making Residential Travel Plans Work: Good Practice Guidelines for New Development") by the Department of Transport, and builds on earlier travel plan guidance. The structure of the travel plan is similar to that for workplaces but the guidance provides a framework for addressing the issues that are particular to residential travel plans, such as:

- ❖ The likelihood that the occupiers of the development are unknown at the time the travel plan is prepared.
- ❖ The need to deal with trips to multiple destinations.

- ❖ The importance of incorporating demand management i.e. reducing the need to travel.
- ❖ The likelihood that there would be no single entity that could undertake future co-ordination and management of the travel plan, as would be the case for an institutional or office development.
- ❖ *Objectives*  
Objectives should flow from the Transport Assessment and/or accessibility audit, and will emphasise the need to provide good access to a full range of services and facilities for residents of the development and to reduce the traffic generated by the development. The scale, type of residential development and ownership/tenancy arrangements will also inform the objectives.
- ❖ *Targets*  
The level of car trips is a common measure of effectiveness of the travel plan, though other measures might involve the uptake of alternative modes of transport or car ownership.
- ❖ *Measures*  
The location of the site in relation to existing public transport routes, health facilities, schools, shop and workplaces etc. will be unique and influence the pattern of travel. Hence the measures necessary to allow good access to these facilities will need to be site-specific. The measures also need to be integrated into the design and marketing so that sustainable patterns of travel are encouraged from the outset.

The travel plan must be founded on good and effective site layout that restricts car movement and intrusion and encourages other modes of transport.

As with destination travel plans, the residential travel plan will comprise a combination of smarter choices (promotion and awareness raising) with hard measures and improvements to design, infrastructure, and services both on-site and off-site. Because of the many purposes of the journeys from home, a wider range of measures may need to be incorporated to encourage more sustainable travel choices. Measures to support walking, cycling and public transport are particularly important, as is parking management and restraint.

- ❖ *Monitoring and review*  
The monitoring process is similar to that for other travel plans, except that the results of the monitoring need to be shared with the residents so their feedback and involvement can be encouraged.

Review arrangements need to be built into the travel plan to take account of new people moving onto the site. Where the aim is to establish a particular facility (e.g. car club, shuttle bus) the review should include an assessment of whether the facility is meeting the objectives or is sustainable.

❖ *Management arrangements*

As with workplace travel plans the role of the Council or appointed Travel Plan Co-ordinator is essential to prepare and effectively implement the travel plan, and with residential travel plans the Co-ordinator will be an important link with occupiers who will have disparate travel needs and patterns.

During construction the Travel Plan Co-ordinator will be involved in marketing and will play a critical role as residents move in. This may include the provision of personalised travel planning, marketing, publicity, and establishment of a management group.

If the role of the Travel Plan Co-ordinator cannot be continued beyond the development stage, arrangements need to be put in place to ensure continued management and funding of the travel plan and its initiatives well into the future. Responsibilities and liabilities should be spelled out to ensure that the travel plan is sustainable once the properties have been sold or when the first occupiers have moved on.

A number of management structures may be incorporated such as steering groups, management companies and community trusts.

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## 8 – MONITORING AND REVIEW

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- 8.1 Monitoring is critical in determining the success of all travel plans, especially where specific targets have been agreed, and to help identify necessary adjustments.
- 8.2 Monitoring of the travel plan will be required to be carried out on a regular basis for an agreed period after approval of the travel plan. Usually, this period will be five years. The arrangements, schedule and funding of the monitoring process should be set out clearly in the travel plan - generally the applicant funds the cost of monitoring.
- 8.3 Therefore, the monitoring section of the travel plan needs to address the following issues:
- ❖ When monitoring will take place?
  - ❖ What is the nature of the monitoring?
  - ❖ Who pays for the monitoring and who has access to the results?
  - ❖ What infrastructure (if any) will be required for monitoring?
- 8.4 Monitoring can be carried out by the occupier, the site-based Travel Plan Co-ordinator, or the Council's Travel Co-ordinator where resources allow. An indication of the roles of the two types of Travel Plan Co-ordinator is set out in Section 5 and in Appendix 5 of this document. In some cases another independent party may be more appropriate to carry out the monitoring, particularly where financial responsibility rests on the outcome. The information monitored should relate to the targets included in the travel plan or other data that helps assess the impact and effectiveness of the travel plan.

### **Monitoring – most types of travel plan**

8.5 Monitoring can include one or more of the following, depending on the type of travel plan and the objectives and targets:

- A 'snapshot' modal split survey for employees, occupiers, residents and / or visitors.
- A full staff / occupier / resident travel survey questionnaire. Surveys should always be conducted at the same time each year for consistency.
- Regular traffic counts of vehicles coming to and from the site, including cycles and pedestrians as well as motorised vehicles.
- Uptake of public transport or other alternative modes.
- Use of parking spaces and any problems of overspill parking.
- Travel diaries.

It should be noted that the developer should agree with the Council, the most appropriate method of monitoring the effectiveness of the travel plan over a specified period of time.

### **Monitoring – schools**

8.6 In addition, schools should make a commitment to undertake annual monitoring by participating in the annual GM Hands Up Travel Survey. The whole school (rather than just one class from each year) should take part in this. Additionally, the school should undertake a repeat survey on each anniversary of their original school travel survey.

### **Monitoring – Residential developments**

8.7 In the case of residential travel plans, the monitoring process is an important element in undertaking a review. A combination of annual surveys and data collection as listed in paragraph 9.5 plus information from the sales office (on the take up of travel incentives and personalised travel plan visits to each household) will assist in reviewing the effectiveness of individual measures and the package of measures and identify areas where new or revised measures may be needed.

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## **9 – IMPLEMENTATION AND ENFORCEMENT**

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9.1 In straightforward cases, it will be possible to secure a travel plan by use of a planning condition requiring the submission of a Travel Plan to the Council and its future implementation. Measures for implementation before the site is occupied (for example the provision of cycle parking) can also be secured in such a way.

9.2 However, for more complex cases a travel plan is better embodied in a Section 106 Agreement of the Town and Country Planning Act 1990. This illustrates the applicant's commitment to achieving the provisions and targets set out within the travel plan, and will give the Council greater confidence in what has been agreed. Furthermore, planning obligations offer greater flexibility and allow more complex arrangements that allow money to be paid

to the Council for transport measures and reciprocal arrangements. In addition, an obligation is preferable because it is negotiated with the developer whereas a condition is generally imposed.

- 9.3 The Section 106 Agreement needs to state precisely the requirements of the travel plan; clear monitoring arrangements; and explicit actions identified in the case of default or failure to reach targets. Care in drafting is needed to ensure that the Section 106 is enforceable i.e. through the use of negative clauses. For example:

*“Development shall not be commenced until a travel plan has been submitted to and approved in writing by the Council.”*

- 9.4 Where a planning condition is used, it will comply with the policy guidance in Circular 11/95: The Use of Conditions in Planning Permissions, and will meet the tests of being:

- ❖ Necessary.
- ❖ Relevant to planning.
- ❖ Relevant to the development to be permitted.
- ❖ Enforceable.
- ❖ Precise.
- ❖ Reasonable in all other aspects.

- 9.5 Where a planning obligation is used to secure a travel plan, it will comply with the policy advice in revised Circular 05/2005 (Planning Obligations). The revised circular facilitates the securing of many components of a travel plan, particularly regarding the widened scope for requiring financial contributions.

- 9.6 Examples of wording for Section 106 Obligations can be found in Appendices F, G and H of ‘Using the Planning Process to Secure Travel Plans: Best Practice Guide’ published by Department for Transport. Appendix 3 also provides an example of what a Section 106 Agreement may contain.

- 9.7 Regardless of the method used to secure the travel plan, the monitoring and review process needs to be clearly defined.

- 9.8 Before reaching the stage of enforcement it is useful if the travel plan has specified contingency arrangements that spell out an alternative measure / target or funding arrangement in the event of a failure to deliver on the initially agreed measures / outcomes.

- 9.9 Enforcement Action will be pursued where:

- ❖ Non-compliance with a Section 106 requirement or condition occurs e.g. to implement a travel plan or a particular measure;
- ❖ Travel plan measures have not met the agreed outcomes or targets and some remedy is necessary; and
- ❖ Some aspect of the travel plan has not operated as intended and needs to be reviewed and revised.
- ❖ Sanctions can be included to specify what should happen in these circumstances, but they should not be seen as a penalty. Sanctions can take a number of forms:
- ❖ Payments to the Council to implement previously agreed measures where these have not been implemented.



- ❖ The requirement to extend the monitoring period and to provide a revised package of measures until such time as the targets are met.
- ❖ Payments to the local authority to cover the cost of taking action to deliver the agreed target (s) where these have not been achieved.
- ❖ Non-return of a 'bond' paid to the Council by the developer prior to commencement of the development, for the same purpose.
- ❖ Specified works that are expected to remedy the failure to achieve agreed outcomes, for example the reduction of car parking spaces or implementation of the 'stick' measures in the travel plan.
- ❖ Specified payment to the Council to meet the cost of taking action to achieve the agreed outcome, for example implementing a car parking zone around the development.
- ❖ Specified change in the way that the site is used in order to achieve previously agreed outcomes, for example, prevention of occupation of part of the site until a specified element of the travel plan has been implemented.
- ❖ Limitations on the way the site can be used or further developed until such time as the agreed target outcome is achieved (for example, by not allowing subsequent phases of the development to proceed).

## 10 - CONTACTS

If you require further information, please contact:

**Andrew Hough (Travel Plans Co-ordinator)**

Planning, Engineering and Transportation Division,  
Lester House,  
21 Broad Street,  
Bury  
BL9 0AW  
Tel: 253 5934  
Email: a.hough@bury.gov.uk

**Jayne Stuart (School Travel Advisor),**

Planning, Engineering and Transportation Division, (address as above)  
Tel: 253 7451  
Email: j.stuart@bury.gov.uk

**Planning Policy Section,**

Planning, Engineering and Transportation Division,  
Craig House  
5 Bank Street  
Bury  
BL9 0DN  
TEL: 0161 253 7391  
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**Traffic Engineers**

Planning, Engineering and Transportation Division,  
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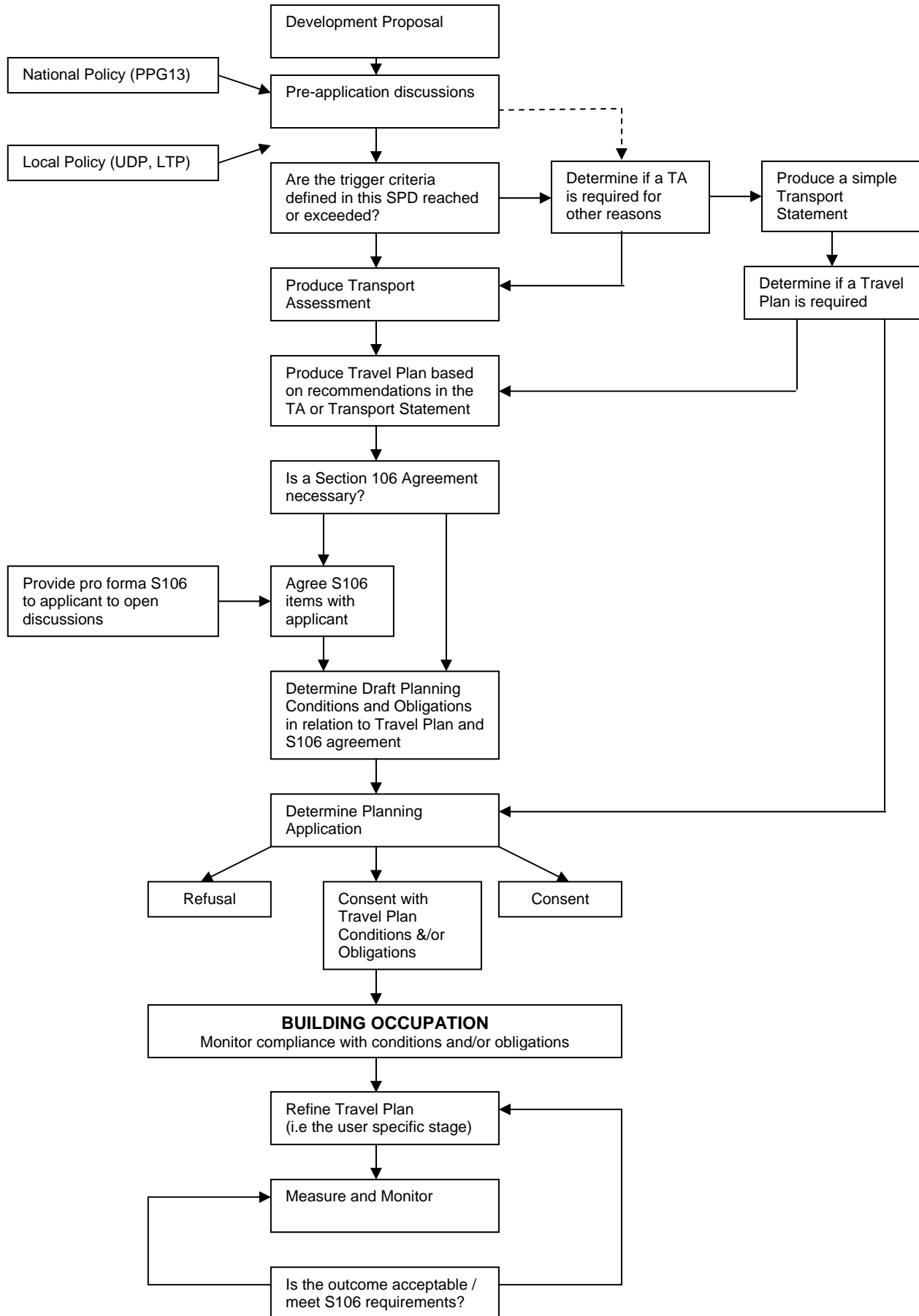
**Development Control Team**

Planning Division  
Craig House  
5 Bank Street  
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BL9 0DN  
TEL: 0161 253 5432  
Email: development.control@bury.gov.uk

**Greater Manchester Passenger Executive**

Portland Street  
Piccadilly Gardens  
Manchester  
M60 1HX  
0870 608 2 608  
Email: publicity@gmpte.gov.uk

# APPENDIX 1 – Mapping the Process – When are Travel Plans and Transport Assessments Required?



## APPENDIX 2 – Examples of Travel Plan Measures/Actions

Examples of travel plan measures/actions include:

### Reducing the need to travel / alternative working practices

Tele-working/remote working/home working  
 Tele-conferencing/ Video-conferencing  
 Flexi-time  
 Compressed working week (9 day fortnight)  
 Provision of facilities on-site  
 Publicise Travel Plan when recruiting

Relocation packages  
 Induction Travel Plan pack  
 Use of local labour

### Walking

Improved network provision  
 Improved network maintenance  
 Sign posting  
 Route Maps  
 Provision of shower / change / locker facilities  
 Provision of umbrellas / rainproof clothing  
 Provision of personal alarms  
 Promotional material and events  
 Self-defence lessons

### Public transport \*

Information provision  
 Personalised journey planning  
 Discounted tickets  
 Interest-free season ticket loans  
 Work buses/shuttle buses  
 Improvements to existing services  
 Improvements to waiting environment \*\*  
 Guaranteed ride home  
 Promotional material and events

### Powered two wheelers –

Provision of secure parking  
 Provision of shower/ change/ locker facilities  
 Interest free loans

### Car park management

Car park permit scheme  
 Car park exclusion zone  
 Car park charging (NOT annual)  
 Parking cash-out

### Fleet management

Review company car policy  
 Van pooling/drive share  
 Reducing business mileage rates  
 Driver training  
 Reviewing mileage rates  
 Route planning  
 Pool cars

### Fleet vehicles

Use of efficient vehicles  
 Use of 'clean fuels'  
 Review company car policy  
 Pool bikes

### Car sharing

Match-finding database  
 Coffee clubs (to find partners)  
 Free parking  
 Reserved parking spaces near to entrance  
 Guaranteed ride home  
 Promotional material and events

### Deliveries

Rationalisation  
 Use of local suppliers

\* Where measures include external bodies such as public transport operators, they should be consulted as early in the process as possible, to ensure that they are able to provide the measures that are required, and to the best possible standard.

\*\* Some physical measures (for example, new bus shelters and cycle routes) will usually be negotiated in conjunction with submission of the planning application.

## **Cycling**

Improved network provision  
Improved network maintenance  
Provision of secure cycle parking  
Provision of shower / change / locker facilities  
Route Maps  
Sign posting  
Interest-free loans or salary sacrifice to buy cycle / equipment

Introduce cycle mileage rates  
Obtain discounts from local shops  
Establish a Bike User Group (BUG)  
'Bike Doctor' and other support, e.g. training  
Staff cycle training  
Provision of pool bikes for staff use  
Promotional material and events

For greater detail see [www.travelplans.org.uk](http://www.travelplans.org.uk)

## **Examples of measures/actions for schools include:**

### **Walking**

'Walking Bus'  
Walking reward schemes e.g. Go for Gold  
Identification of safer walking routes  
Lockers for pupils to store books / bags  
Park and Walk scheme  
Walking campaign  
Shelter for walking parents  
WOW (Walk Once a Week) initiative

### **Cycling**

Cycle training courses  
Identify safe routes for cycling  
Secure cycle storage  
Showers, changing facilities and lockers  
Provision of helmets and bright clothing  
Bikers' Breakfast incentive  
'Bike bits swap-shop' and a 'Bike Clinic'  
Poster / leaflet campaigns  
'Cycle trains'  
Discounts at local bike shops

### **Public Transport**

Promoting use of bus and rail  
Additional school buses  
Concessionary bus fare scheme  
Parent escorts on buses  
Information and publicity  
Private minibuses

### **Car Use**

Car share matching scheme  
'Drop-off' point away from the school gate  
Ban cars from the school gate area

### **Highway Measures**

20mph zones outside school  
Priority measures for school buses  
Cycle lanes and cycle tracks  
Safe crossings outside school / along routes  
School crossing patrol  
Junction narrowing / parking reorganisation

### **School Management Issues**

School policy  
Staff supervision of entrance  
Access restrictions in school  
Timetable planning and length of school day

### **Road Safety Training / Classroom Work**

Pedestrian training  
Cyclist training  
Parent escort training  
Cycle helmet wearing initiatives  
Pre-driver training  
Road safety curriculum work  
Safe route planning (Geography)  
Bike shed design (CDT)  
survey analysis (Maths / Computing)  
Promotional work (English, Art and Drama)  
Risk management, health and citizenship (PSHE)

**For greater detail or more information on school travel plans, please contact your Council School Travel Adviser / Travel Co-ordinator (contact details can be found in section 10).**

**Examples of measures/actions for residential travel plans:**

**Site Design**

Permeability for pedestrians and cyclists  
 Traffic calming /pedestrian and cycling friendly infrastructure  
 Highways safety measures  
 Site speed limits  
 Restrictions on car movements within site  
 Parking restraint  
 Minimising intrusion from parking  
 Areas for social exchange, recreation, seating, play, and biodiversity  
 Cycle parking on site and in home where accessible  
 Bus routing: ensure road design allows bus to reach all development and connects well with the surrounding area  
 Bus infrastructure such as stands, stops, shelters, bus gates and real time information (where services will be entering the site)  
 Adoption of home zone principles or home zone features

**Improvements to off-site access**

Road safety improvements to highways infrastructure serving the site  
 Creation and enhancement of cycling and walking links serving the site  
 Provision of off-site bus infrastructure /priority on routes serving the site

**Measures to support complementary travel plans, on site and off site**

Schools  
 Workplaces  
 Leisure facilities

**Public transport improvements**

New or enhanced bus services  
 Facilities to improve interchange (e.g. cycle parking/ lockers at stations)  
 New or enhanced rail services  
 Free/discounted use of public transport

**Car club**

Service established on site  
 Parking bays allocated  
 Free/discounted use of car club

**Other services to support sustainable travel**

Broadband access and provision of office space in houses  
 Home delivery grocery service and refrigerated drop-off points on site  
 Taxis  
 Car share scheme  
 Bicycle user group / buddy scheme  
 Free/discounted cycles  
 Cycle centre  
 Travel welcome packs  
 Personal travel advice  
 Community travel forum  
 Community travel notice board/website  
 Travel plan training for sales/marketing team

**Facilities that reduce the need to travel**

Health centres/surgeries  
 Education/childcare  
 Community centre or similar  
 Shopping/home delivery – e.g. convenience store; cool storage areas for collection of groceries  
 Employment – e.g. mixed residential/office use or live/work accommodation, broadband, telecentre  
 Leisure

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## APPENDIX 3 – Role of a Travel Co-ordinator

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The role of the Travel Plan Co-ordinator will be to manage the Travel Plan, liaise with the Council and provide monitoring information. As previously indicated, this may be a full time post or may involve extending the job profile of an existing employee. The role may include the following duties:-

- Promote, publicise and encourage the use of travel modes other than the car;
- Ensure that all relevant information is provided to all new members of staff/visitors/pupils and that up to date information is clearly displayed on the notice boards or via the intranet (if applicable);
- Arrange and record surveys of car park usage as required by the Council;
- Co-ordinate car sharing arrangements in whatever manner the organisation has decided upon;
- Arrange for either full or snapshot travel surveys to be undertaken of all people on the site at intervals agreed with the Council;
- Liaise with public transport operators and officers of the planning and transportation authorities and arrange regular meetings with all interested parties;
- Organise workshops and induction seminars to educate existing and new staff.

**NOTE:** Support and advice will be available from relevant officers at Bury MBC (see contacts).

## APPENDIX 4 – Examples of Skeletal Section 106 Clauses

### Speculative developments

For the case of speculative developments (see point XX), it is **likely** that the following clauses may be included into the Section 106 Agreement:

#### ***“Definition Clause within the Recitals of the Deed***

*The expression “the developer” shall include any successors in title and assigns, in respect of all or part of the development.*

#### **Covenants**

*The developer shall annex a copy of the completed Section 106 Agreement to any contract for sale or lease, for all or part of the development, and shall expressly bring to the attention of any purchaser or lease the obligations therein.*

The developer shall inform the Council of the identity of purchasers and lessee’s of the development within one month of any signed contract.”

#### **Other cases**

In other cases, examples of a Section 106 agreement may include the following:

### XXX SCHEDULE

#### 1. TRAVEL PLAN

- 1.1 The Owner hereby covenants with the Council that by no later than (Date) it shall prepare and submit to the Council for its approval a draft Travel Plan (as herein defined) in respect of the proposed occupiers of each of the buildings
- 1.2 The Council shall not unreasonably withhold or delay its approval of the draft Travel Plan
- 1.3 The Owner further covenants with the Council that it will implement and then comply with the recommendations set out in the approved Travel Plan and will use all reasonable endeavors to meet the targets set out therein PROVIDED THAT one of the said targets shall be the achievement of such specified minimum percentage of employees of each of the buildings using a mode of transport other than the private car as may be reasonably agreed between the parties
- 1.4 The Owner hereby covenants with the Council that it shall monitor and review the workings of the Travel Plan and submit returns to the Council on the date twelve months' after the date of approval of the Travel Plan and next on the date twelve months following the first return and thereafter at three yearly intervals for a minimum period of fifteen years showing how the Travel Plan has operated during the relevant preceding period and specifically how effective the Travel Plan has been in implementing its recommendations and in achieving its targets



- 1.5 The Owner hereby covenants with the Council that it will at the same time and every time that a return is submitted to the Council pursuant to Clause XX a revised Travel Plan will be submitted to the Council for its approval and it shall be open to the Council in approving the resubmitted Travel Plan to suggest reasonable ways of improving the effectiveness of the Travel Plan and the Owner shall use its reasonable endeavors to implement any such reasonable suggested improvements within a time scale to be agreed with the Council
- 1.6 It is hereby agreed between the parties hereto that without prejudice to the generality of the foregoing in resubmitting the Travel Plan as required by Clause XX the party resubmitting shall demonstrate to the Council on each occasion that it has used all reasonable endeavors to minimise the number of single occupancy vehicle trips to and from the relevant building

## APPENDIX 5 – Example of a Staff Travel Plan Survey

The following questions provide examples of questions that can be asked in staff travel plan surveys. However, each development will be unique so the example questions would need to cater for the proposal. It is recommended that proposed questionnaires be submitted to the Council's Travel Plan Co-ordinator, for approval prior to the survey being carried out. Other examples of questions can be found at: <[www.travelplans.org.uk](http://www.travelplans.org.uk)>

“All staff are being surveyed on their commuting methods and travel at work. The data will be used to develop and promote measures to improve work-related travel for all employees. Individual information will not be highlighted. By completing this questionnaire you will be entered into our prize draw of .....Your time is appreciated”.

### 1. Home Postcode:

.....

### 2a. How do you mostly travel to work?

- Bus
- Cycle
- Train
- Walk
- Motorbike
- Other
  
- Car (*please answer questions 2b/2c below*)

### 2b. For car users only:

How many people do you travel with?

- Alone
- Car with other – If so, with how many?  
.....people

### 2c. Where do you normally park?

- Nearby street
- Commercial car park
- Park and Ride
- At workplace

### 3. How far do you travel to work?

.....miles/km

### 6. Which of the following would encourage you to participate in organised car sharing scheme? List in order:

- Confidential database of potential sharers
- Free taxi home in emergencies
- Reserved car parking space
- If I have to pay for parking
- If transport provided for travel needs during work
- If I find another way of doing activities such as shopping/dropping off children on the way to work
- Nothing
- Other

### 7. Given the right equipment would you work from home?

- Yes – regularly
- No – not at all

### 8. How often do you use a vehicle in the course of work?

- Never
- More than once a day
- One/two days a week
- Once or twice a month

**4. Which of the following would encourage you to cycle to work? List in order:**

- Improved cycle paths
- Improved cycle parking at work
- Improved changing / showering facilities
- If I find another way of doing activities such as shopping / dropping children off on the way to work
- If transport provided for travel needs during work
- When I have to pay for parking
- Interest free loan
- Nothing
- Other

**5. Which of the following would encourage you to use public Transport? List in order**

- More direct bus routes
- More frequent bus service
- More reliable bus service
- Better connection from home to work
- Better facilities at bus shelters
- If links to the bus/station are better
- More reliable trains
- Discount tickets available at work
- Better connections from home to the rail station
- Better connections from rail station to work
- More frequent trains
- Clear public transport information at work
- If transport provided for travel needs during work
- If I find another way of doing activities such as shopping/dropping children off on the way to work
- Nothing
- Other

**9. Do you use public transport for work purposes?**

- Yes
- No

**10. If pool cars/bikes were available for work trips would you use one?**

- Yes
- No

**11. Please write any comments here and improvements which you think may ease congestion**

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**12. Data protection:**

Data gathered from this survey will be used to help develop the Travel Plan. Summary data that does not contain personal details may also be shared with Public Transport providers solely for the purposes of enhancing services.

I consent to data being used as outlined above

- Yes
- No

*Thank you for your time.*

If you wish to be included in the prize draw, please write your name and department here. This slip will be used for the purposes of the prize draw only.

Name:

Department:

## APPENDIX 6 – Policy Framework & Useful References

### General References

This SPD and the parking standards contained within it have been prepared in light of the following policy documents:

- ❖ *Bury Unitary Development Plan*, Bury MBC, 1997
- ❖ *Planning Policy Guidance Note (PPG)13: Transport*, Department of the Environment, Transport and the Regions, 2001
- ❖ *Regional Spatial Strategy (RSS) for the North West (RPG 13)* (first published March 2003) and the current *Regional Spatial Strategy (RSS 13)*, North West Regional Assembly, 2006
- ❖ *The Provisional Second Local Transport Plan (LTP2) 2006/7 – 2010-11*, Association of Greater Manchester Authorities (AGMA) and Greater Manchester Passenger Transport Executive (GMPTE), 2006
- ❖ *Travel Plans. A Guide for Developers, General Information Report 84*, Energy Efficiency Best Practice Programme, 2001
- ❖ *Using the Planning Process to secure Travel Plans*, Department for Transport (DfT) 2002

### Useful References

#### School travel plans

- ❖ *A safer journey to school: a guide to school travel plans for parents, teachers and governors*, Transport 2000 Trust for DETR, DfEE and DH (DfEE, June 1999)  
[www.dft.gov.uk/local-transport/schooltravel](http://www.dft.gov.uk/local-transport/schooltravel)
- ❖ School travel resource pack – includes posters, fact sheets, survey questionnaires, OHP slides and note, and a resource list, DfT revised January 2003  
[www.dft.gov.uk/local-transport/schooltravel](http://www.dft.gov.uk/local-transport/schooltravel)

#### Websites

[www.travelplans.org.uk](http://www.travelplans.org.uk)

Further information on all aspects of travel plans is available from the Greater Manchester website.

[www.dft.gov.uk/stellent/groups/dft\\_control/documents/contentservertemplate/dft\\_index.html?n=6041&l=3](http://www.dft.gov.uk/stellent/groups/dft_control/documents/contentservertemplate/dft_index.html?n=6041&l=3)

Many resources are available from the Department for Transport website, including good practice guides.

<http://www.transportenergy.org.uk/>

Transport Energy provides best practice guidelines, case study reviews, seminars and free consultancy advice on travel plans.

[www.communities.gov.uk/index.asp?id=1144015](http://www.communities.gov.uk/index.asp?id=1144015)

PPG13 is available in its entirety here.

<http://www.bury.gov.uk/Environment/Planning/DevelopmentPlanning/UnitaryDevelopmentPlan/ViewUDP.htm>

Link to Bury UDP

[www.gmltp.co.uk](http://www.gmltp.co.uk)

The Greater Manchester Local Transport Plan is available from this site, along with each of the Annual Progress Reports.

### **Publications:**

How a Travel Plan Can Help You: the Greater Manchester Travel Plan Guide.  
Published by the Joint Transport Policy Team, 0161 242 6020

A Travel Plan Resource Pack for Employers  
Published by Transport Energy, 0845 602 1425

Making Travel Plans Work: Research Report  
Published by DfT, 020 7944 3000

Using the Planning Process to Secure Travel Plans: Best Practice Guide  
Published by DfT, 020 7944 3000

Safer Journey to School: a guide for teachers, parents and governors  
Published by DfT, DETR, DfEE, T2000 Trust, Safer Routes to Schools

Making Residential Travel Plans Work: Good Practice Guidelines for New  
Development Published by DfT

Smarter Choices: Changing the way we travel  
Published by DfT October 2004

## APPENDIX 7 – Glossary

<b>Approved Travel Plan</b>	A Travel Plan which has been evaluated by the Council and deemed to be acceptable.
<b>Greater Manchester Passenger Transport Executive (GMPTE)</b>	Greater Manchester Passenger Transport Executive - Passenger Transport Authorities are responsible for providing the services and facilities which the market does not provide in large conurbations. GMPTE is funded by the 10 district councils of Greater Manchester.
<b>Local Transport Plan (LTP)</b>	Local Transport Plan – This a five-year integrated transport strategy, prepared by local authorities in partnership with the community, seeking funding to help provide local transport projects. The plan sets out the resources predicted for delivery of the targets identified in the strategy. Local transport plans should be consistent with the policies and priorities set out in the Regional Transport Strategy as an integral part of the Regional Spatial Strategy.
<b>Interim Travel Plan</b>	An outline of measures to be implemented before development and occupation as far as possible. Also contains a timetable for submission of the final Approved Travel Plan.
<b>Modal Share</b>	Numbers who travel in each different way of traveling.
<b>Modal Shift</b>	Numbers who change from one way of travelling to another.
<b>Section 106 Agreement</b>	This is an agreement made under section 106 (s.106) of the Town and Country Planning Act 1990 to secure a planning obligation, previously section 52 of the Town and Country Planning Act 1971. S.106s usually involve a benefit to the community arising out of the grant of planning permission. Major development will almost always have an impact outside the boundaries of the application site. Legitimate additional works, such as highway improvements or a new school, may be required, usually under a s. 106 agreement.
<b>Snapshot Travel Surveys</b>	A quick survey which simply asks how staff got to work on that particular day.
<b>Target/s</b>	A measurable goal needed to assess whether the objectives of the plan have been achieved.

<b>'TRACES' evaluation criteria</b>	
<b>T - Transparent</b>	Plans should identify clearly which organisations are responsible for all elements of the plan, where the financing will come from, and how targets have been developed
<b>R – Realistic</b>	Plans should set realistic but stretching targets, which reflect Local Development Framework and Local Transport Plan policies and the likely make-up of new occupiers/inhabitants. Targets should take account of previous experience of people adopting sustainable transport choices (e.g. in response to travel plans and personalised journey planning).
<b>A – Achievable</b>	Plans should only include measures which developers and partners in the process are capable of delivering and which are likely to have a positive impact on transport behaviour.
<b>C – Committed</b>	Plans need clear commitment from the developer for the period of their implementation and beyond to their establishment. This can be demonstrated, for example, by the appointment of a travel coordinator and the setting aside of funding to take the plan forward.
<b>E – Enforceable</b>	The commitments established in the Plan need to be enforceable by local authorities under the accompanying S106 agreement. This demands precision and clarity in the way measures are set out in the travel plan.
<b>S - Sustainable</b>	Plans need to demonstrate how they will be managed in the longer term. This includes specifying arrangements for the transition of responsibility for the plan from developer to occupiers, residents or other organisations and continuing sources of funding for the plan.
<b>Transport Assessment</b>	A review of all potential transport impacts of a proposed development with a plan to minimise any adverse consequences.



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[www.bury.gov.uk/planning/home.htm](http://www.bury.gov.uk/planning/home.htm)



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May 2007

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Director of Environment & Development Services

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