



# Travel Plan Guidance

December 2006

This document should be used in conjunction with:

- Travel Plan Template
- Access and Parking Strategy for Health Campuses in the Perth Metropolitan Area

All documents are available at [www.health.wa.gov.au/parking](http://www.health.wa.gov.au/parking)

## **Introduction**

For your travel plan to reap real benefits it must be *owned* by your organisation. The plan should therefore reflect the way you do business, where you are located and how much time and resource you can put into it.

The main resource, however, is your enthusiasm!

Rather like undertaking an exam at school, you should read through all the guidelines before commencing your travel plan!

## **How long will it take?**

A difficult question! It depends on the size of the organisation, the size of any problem you have and how much resource you can commit.

You should aim to launch a travel plan as soon as practicable (within 12 months as a rule of thumb). Aim for some early quick wins in the action section – it is a worthwhile marking this progress with some form of ‘celebration’. You do not need to wait for all measures you wish to be introduced to be included in your plan – put them on the action sheet for completion in the longer-term.

## **The process**

A travel plan is a dynamic, evolving management tool that will take account of changing circumstances. As targets are reached, new ones are set.

These guidelines will give you advice on how to organise the production of your plan.

Employers with ‘mature’ travel plans find that over time ‘travel planning’ becomes a less contrived process. The policies/ initiatives that you develop will just become a part of how your organisation does its business.

## **Your people**

Your plan will be seeking to influence the travelling behaviour of your staff. It is therefore very important to keep them informed and involved on what is going on at each stage of the process; seek their information from your travel survey and seek their views in focus groups.

***The following pages give you advice on how to complete each section of your travel plan template***

## Travel Plan guidance

In the template plan the contents section is in a table to allow you to format it easily.

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<b>Appendices</b>		
	<i>Could include the following</i>	
<b>A</b>	<b>Plan of site</b>	
<b>B</b>	<b>Location of site</b>	
<b>C</b>	<b>Survey form</b>	

## Brief summary

*This is a stand-alone summary of the travel plan and should NOT be drafted until the document is completed*

This should:

- Give the reader a 'flavour' of your plan
- Why the need for the plan (the problem?)
- The overall objective(s) of the Travel Plan
- A brief summary of the significant measures to be introduced?

Later versions of the Travel Plan document should include a summary of progress towards targets within this section.

## Executive policy statement

*This should be a clear, short, positive statement of intent, detailing the overall organisation ethos/ policy on travel. This should also be one of the last sections to be completed.*

The executive policy statement should:

- be signed (and ideally drafted) by the most senior person(s) in the organisation
- be quotable!
- give enthusiastic endorsement to the aims and objectives of the plan
- confirm that the senior management team is 'onside' with the plan's aims and objectives
- give details of any senior managers who are taking initiatives themselves (eg. cycling to work, sharing car journeys). This is very effective and shows the plan is for the whole organisation.

## Introduction

*Use this section to set the context of why the travel plan is being developed. **Certain paragraphs of the Introduction will be drafted after the bulk of the plan is completed.** Use the following to give you ideas for the content of this section.*

### 1.1 Background Information

#### Policy Context:

- ***Make a general statement about what a travel plan is.***  
In basic terms a travel plan is a package of measures aimed at promoting walking and cycling, and reducing car use. It has several benefits including the health and fitness of the workforce, increasing capacity of the car park, as well as environmental benefits through reducing congestion and pollution.
- ***Discuss the transport issues in and how they sit within a metropolitan context.***  
This is optional. However it can show that your organisation is aware that it is a part of the 'bigger picture'. Examples of useful phrases/paragraphs can be provided if required.

#### Organisational Context:

- ***Discuss the organisational context in the briefest terms (more detail will come later):***  
A brief description of the site and organisation (to set the context rather than provide detailed information which comes in Section 3)  
Location, history and on-site activities could be included in general terms

### 1.2 Reason for Travel Plan at your organisation

- ***List the main motivations for writing your travel plan, for example:***
  - Parking issues
  - Health and fitness of staff
  - Environmental concerns
  - Access to site
  - Planning permission
  - Overflow staff parking in nearby roads
  - Recruitment and retention difficulties
- ***Discuss the benefits of writing a travel plan. Some of the many benefits are***

***listed below:***

For the **organisation** this might include:

- increased productivity and reduced turnover of staff
- demonstration of positive corporate social responsibility
- improved employee health fitness through increased levels of walking and cycling
- saving business travel costs
- reduced illegal car parking

More widely the benefits to your **neighbours** and the **environment** might be:

- no staff parking in local streets
- improved local air quality and reduced CO<sub>2</sub> emissions
- potential for reduced congestion and traffic within and around the area (assisting the local economy)

Who will benefit?

- Workforce
- Local economy
- Environment

## Roles and responsibilities

*This section will describe how you have produced the plan and who has done what. It will also highlight the person(s) who will be responsible for the action plan (see Section 6)*

To complete the travel plan your organisation should consider the following:

### Travel Plan co-ordinator

At the outset identify someone who will lead on the writing and implementation of the travel plan. This person will either have the authority to make decisions themselves or have support of a senior manager who can facilitate decision making.

The person appointed will need to have:

- support from senior management
- access to other support (eg. IT, finance, administration)
- a sense of humour and a thick skin!

It should be recognised that the work involved in the first 12-18 months of a plan can (dependent on size of organisation) be significant. There may also be need to spend some money (see Section 9 - Financial Issues)

### Steering Group

The co-ordinator will need much help and support. Consider setting up a travel plan steering group to advise on issues (you may have a pre-existing group that could be adapted to perform this function). The Steering Group should include senior representatives from:

- Finance
- HR
- Estates
- Unions (if appropriate)
- Workforce
- Management

The steering group should:

- Oversee the direction, and funding of the travel plan
- Provide access to support (eg. IT and administration support)
- Consider setting up **working groups** to look at particular initiatives (e.g. car park management; promoting cycling etc.).
- Consider setting up **networks** with local organisations and employers.

You could use a table to list actions to be undertaken in setting up the group and allocating responsibilities (this need not appear in the final plan).

Action	Responsibility	Date	Resources required
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## Travel Plan guidance

<i>What is required</i>	<i>State who will be responsible for each action</i>	<i>Provide a date for the action to be started/ completed/ reviewed. For example 'annually, June 2005'</i>	<i>State what resources will be required including any funding implications. For example 'I.T. technician time; \$10,000'.</i>
Appoint travel plan coordinator			
Decide on the frequency of meetings			
Add as required			

### Others

List others you may have consulted in the process. For example:

- Public Transport operators
- Neighbours
- Local government



## Organisation assessment and current travel

### 3.1 Site assessment

#### 3.1.1 Location and facilities

*This section will be a review of your site. You will use this to look at what actions you can take to improve employee/ patient/ visitor choice in travel to your site.*

- It is very helpful to include an annotated plan of the site(s) including reference to the locations of all relevant facilities and access points. This can be included as an appendix
- A description of the site locality
- Describe the site and any current issues, problems or areas of concern. For example:
  - Identify any notable bus / cycle / walking routes for example a cycle path leading to the site.
  - Location of bus stops
  - The number of bus services and any timetable issues.
  - Current car park management policy
  - Number of car parking spaces (including disabled and patient/ visitor spaces and access)
  - Other parking spaces – cycles, motorbikes, special purpose etc.
  - Parking/ congestion on site and/or off site
  - Description of the quality of access to site by all modes of travel.
  - Changing/showering facilities

#### 3.1.2 Size of organisation

- Use this section to describe the size of your organisation, how many people work at the various activities.

#### 3.1.3 Activity of organisation

- Does the nature of your site have any particular influence on the generation of travel?
- Who uses the site?
- Describe the activities before and after standard opening hours?
- How are patients and visitors accommodated?  
What information do you provide about how to access your site?

#### 3.1.4 Development Plans

Include any future plans the organisation may have that will impact on travel to the site. Such plans could affect which measures will be most effective in the long term and could include:

- Organisation expansion
- Changes in numbers of people using the site
- Local non-organisation developments; (eg. withdrawal of a bus service, infrastructure improvements; improvements to local roads)

#### 3.1.5 Review of current HR and other policies

Terms and conditions of service can greatly affect the success of your plan. In this section review all current HR policies that may affect employee travel:

- **Car park policy:**  
This may be the most appropriate section to cover how you allocate car park passes
- **Loans and subsidies:**  
Are any subsidies available for encouraging public transport use?

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- **Flexible working/ work-life balance:**  
Does the organisation have policies on:
  - Flexi hours
  - 9-day fortnights
  - Working from home
- **Business travel:**
  - This may more appropriate in this section. See 3.2.4

## 3.2 Travel Survey

A travel survey of staff will provide essential information that, together with your site survey, will give you ideas on where your efforts are best spent.

### 3.2.1 Method

You should explain how your data was collected. Include details on number of forms issued, number returned and percentage of survey population etc.

### 3.2.2 Current modes of transport

Survey results should be tabulated with percentages and numbers (for example, 20% of commuting journeys are made by car when 100 people using the site is a vastly smaller number of cars than 20% in an organisation with 1500 users).

An example of how to set out your results can be found in the template. Others are set out below:

#### How people currently travel

Mode of travel	Percentage	Number of trips
Walk	30%	30
Cycle	5%	5
Car	45%	45
Car Share	15%	15
Public transport	3%	3
Other	2%	2

In addition, it may be beneficial to establish how your employees would like to travel to the site, and what is preventing them from choosing the other mode(s). Measures can then be included to try and address this difficulty.

#### How people would prefer to travel

Mode of travel	Percentage	Number of people
Walk	30%	30
Cycle	35%	35
Car	15%	15
Car Share	15%	15
Public transport	3%	3
Other	2%	2

### **3.2.3 Home location of staff**

#### **Mapping**

Showing where your employees live on a map gives a useful visual idea of where initiatives could be developed. For example you may find clusters of employees who could access a direct bus service to your site. Alternatively clusters of employees could be encouraged to car share.

There are many software applications that can easily produce such maps. You can also commission mapping from software companies – look in yellow pages or do an internet search.

Your HR department should be able to supply tables of employee home postcodes. Any information provided and presented must abide by data protection regulations; for example postcode information cannot be used to target particular users.

You may prefer to include the mapping as an appendix.

### **3.2.4 Business travel**

Some organisations discover that they can create significant financial and environmental gains by reconsidering how they organise business travel.

Describe current arrangements for business travel. Are policies likely to discourage consideration of alternatives to the car for travel on business?

Include information on any policies for example:

- policies for pool cars or pool bikes,
- travel to other sites,
- use of own vehicles for business,
- business mileage rates – and costs to the organisation.
- number of business miles claimed
- driver training

### **3.2.5 Analysis of survey**

Use this section to comment on the findings of the travel survey, the site survey and the review of HR policies. This will bring together the evidence from which you will develop the objectives for your plan.

Also discuss any issues raised through the consultation (perhaps through focus groups) and the survey – for example were there issues of safety or specific areas of concern? Think about the following:

- What are the key issues that need to be overcome?
- Do the results point to any particular problems that need to be addressed?

## Objectives

Your organisation will want to set objectives that help resolve the issues raised in Section. 1.2. It is worth remembering, however, that the over-arching aim of any travel plan (whether stated or not) is:

***‘To reduce the number of cars arriving at the site’***

The evidence accumulated in Section 3 will inspire the setting of appropriate and achievable objectives. The objectives set out here will provide focus and direction for the travel plan.

- The objectives state what you want to achieve by implementing the travel plan
- You should concentrate on the primary reasons (problems) that inspired you to write the plan – you may like to prioritise the objectives
- Examples travel plan objectives could be:
  - To improve to choice of transport modes available to employees travelling to work
  - To decrease the total greenhouse gas emissions generated by the business
  - To promote a healthy workforce
  - To reduce pressure on the car parking areas
  - To reduce the numbers staff parking on residential streets

## Targets

*To give momentum to achieving your objectives you should set targets. Targets should be challenging, but realistic. They should have a deadline that should aim to reach fruition in the short and longer terms.*

- Targets should be *SMART*
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**ealistic
  - **T**ime-bound

It may be helpful to set out the measures, the deadlines and the targets in one table. An example of how this could be down can be seen below.

Objective	Targets	Timescale			
<b>Reduce drive alone commuting</b>		01/01/Xxstart	01/01/XX target	01/01/XX target	01/01/XX target
	Increase journeys to site by walking	28.3%	29%	30%	31%
	Increase journeys to site by cycling	31.7%	33%	34%	35%
	Reduce journeys to site by car	65%	60%	57%	55%

## Actions

*Actions will be set that help your organisation achieve its objectives and meet the targets set in Sections 4 and 5.*

List the **actions** taken/ to be taken in table format with

- **dates** for completion
- **who will undertake the actions**
- **how much** resource will each action cost (time and money)
- **where** will the resource come from

### Publicity

Implementing a travel plan is good news for your organisation and could lead to some positive publicity in the local and national press.

Within your organisation it is important to manage promotion and publicity effectively.

Publicity is therefore a key action that will help you meet many of your travel plan objectives – and indeed you may decide to make it an objective in its own right.

- **Internal**
  - Presentations in staff restaurant, entrance foyer
  - Organisation newsletters
  - New starter packs
  - Intranet site web page
  - Email promotions
- **External**
  - Press releases for significant measures
  - Press release if you meet your targets
  - Invite the press to launch events
  - Invite the press to Bike Week events
  - Don't forget trade publications
  - Promotion of your travel plan on your website

## Actions to promote travel choice

*Below are some ideas of actions to consider that promote travel choice. This is not a complete list.*

### Walking

- Walk to work campaign
- Pool umbrellas for when it rains
- Car free day
- Buying lockers for staff to keep a change of clothes and walking shoes.
- Some heated lockers to allow clothes to dry
- Promote healthy ways to get to work
- Promoting the social advantages of walking

### Cycling

- Provide good quality cycle storage
- Organise a cycling awareness campaign
- Provide cycle maintenance sessions
- Provide helmets and bright clothing

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- Hold adult cycle training courses
  - Set up a Bicycle User Group
  - Produce map of cycle routes to site
  - Promote safe cycling through events and publicity
  - Promote healthy ways to get to work
  - Provide lockers for keeping a change of clothes increase business cycle mileage allowance
- Bus and train**
- Work buses
  - Concessionary public transport fare scheme (be aware of tax policies)
  - Information and publicity on services
  - Private minibuses
  - Public transport notice board
  - Intranet travel site
- Car**
- Joining a car-share scheme
  - Provide incentives for staff not to travel by car to work
  - Encourage partners to drop employees on route to their destination, known as “Kiss and Ride”.
- Car park management**
- Ensure a fair and equitable allocation of spaces based on need
  - Give priority parking to car sharers.
  - Encourage senior managers to give up priority spaces.
  - Restrict the number of days employees can park on site.  
Restricting staff to parking on site to four days a week would reduce the number of trips by 20%.

### Presenting your actions

The template plan has one idea for tabulating your action list.

You may, however, find it easier to tabulate your objectives, targets and actions in one table similar to the one on the next page. This ensures that the connections between the three areas are explicit in one table.



Objective:									
Target:									
Action		Responsible person(s)	Timescale	Success criteria	Monitoring and evaluation			Resources required	
No.	Description				Method	Timescale	Responsible person(s)	Requirement	Funding

## Monitoring and Evaluation

*You will want to know if you your hard work has produced any results. The organisation management will want to know if the resource they have invested has paid off.*

### Monitoring

You should aim to monitor progress at least every 12 months. If you have the resources you may like to do this more often in the first year.

Identify how you will test the effectiveness of your travel plan; what will be the indicators of success

You will need to cover:

- Who will be responsible for collecting the information needed?
- What information is to be collected? This will relate directly to the targets you have set.
- It will include quantitative information (e.g. % increase in cycling/ walking) as well as qualitative information (change in perceptions about safety/ health/ built environment).

### Annual survey

How will you collect the information?

### Evaluation

You will use the monitoring information to evaluate the success of your initiatives.

(Below is an example of a summary table that could be used in this section).

Action ( <i>examples</i> )	When	Achieved	Responsibility
Count number of cars in car park regularly	Quarterly		Working group
Collect modal split data	October annually		
Publish transport survey results on web site	November annually		Webmaster
Review travel plan	September annually		Travel Plan coordinator
Add in depending on objectives/ targets			

## Financial Issues

*There will be costs associated with setting up and maintaining the travel plan. It is important to identify where funding is likely to come from.*

The travel plan process and the initiatives produced will require resources to ensure success. Where will these resources come from? If a travel plan coordinator is appointed, set out where the funds are coming from for this post.

The action tables in Section 6 will have identified the resources needed to implement each action.

### **Income**

Income raised from car parking may be used to fund travel plan initiatives to support other modes of transport.

# Delivering a **Healthy WA**

