Making residential travel plans work: guidelines for new development

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Making residential travel plans work: good practice guidelines for new development

Prepared for the Department for Transport by Transport 2000 Trust
With Addison & Associates, Lilli Matson & Carey Newson

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Foreword

Travel Plans are an increasingly important tool in the delivery of sustainable development. They provide, together with transport assessments, the mechanism for assessing and managing access to sites. There is now considerable experience available to guide the preparation of travel plans for schools and workplaces but little has been produced which relates explicitly to residential travel plans, an area of increasing importance. This new guidance is timely as the provision of new sustainable residential developments is a
key Government objective and the preparation and implementation of travel plans will be critical to its delivery.

This guide provides detailed advice on all aspects of preparing a residential travel plan and securing it through the planning system. It is intended to help local authorities, developers and their consultants. It builds on the earlier generic guidance produced by the Department for Transport and Office of the Deputy Prime Minister Using the planning process to secure travel plans: best practice guidance for local authorities, developers and occupiers and should be read in conjunction with it. It focuses on the particular issues which are unique to residential travel plans.

The advice is based on an in-depth review of eight case studies of specific residential schemes together with a review of best practice in particular relevant areas such as car clubs. It draws together the strengths of the different approaches and the problems faced, suggesting possible approaches not only to secure effective residential travel plans but also to aid an efficient planning process.

However, given the limited scale of experience nationally of developing residential travel plans, it should be recognised that emerging good practice is at an embryonic stage.

This guide, therefore, is not intended to be prescriptive and the checklists and other contents are not definitive. They are only intended as guidelines to help local authorities and developers structure their approach to residential travel plans by drawing on the lessons learned so far. Each site is unique and the travel plan should relate to the specific issues and needs of the site under consideration. Account needs to be taken of the type, location and scale of residential development and whether it is part of a mixed use development when assessing what is required and deliverable. Partnership working between the applicant and developer will be crucial to the delivery of effective outcomes.

**Contributors**

"Making residential travel plans work: Good practice guidelines for new developments" was commissioned by the Department for Transport in consultation with the Office of the Deputy Prime Minister. It was written by Lynda Addison and Jean Fraser of Addison & Associates, Carey Newson and Lilli Matson with input from Katinka Broersen of Transport 2000 Trust.

The project team was supported by a steering group which included, at various stages of the project:

- Jeremy Kettle Department for Transport
- Jacqui Wilkinson Department for Transport
- Linda Bullivant Office of the Deputy Prime Minister
- Kenneth Cameron Office of the Deputy Prime Minister
- Alex Lessware Office of the Deputy Prime Minister

The following authorities and developers were involved in the case studies used in this Guide:

- Queen Elizabeth Park, Guildford: Surrey County Council and Laing and Linden Homes
- Caterham Barracks, Surrey: Surrey County Council and Linden Homes
- Grand Union Village, West London; London Boroughs of Ealing and Hillingdon and Grand Union Vision Limited (Taylor Woodrow and Bryant Homes)
New England Quarter, Brighton: Brighton & Hove City Council and QED
High Royds, Leeds: Leeds City Council and Raven Group
Poole Quarter, Poole, Dorset: Borough of Poole Council and Crest Nicholson
Seldown, Poole, Dorset: Borough of Poole Council and Western Challenge Housing Association
Plough Lane, Wimbledon, London: London Borough of Merton and David Wilson Homes

**Introduction**

"The way our communities develop, economically, socially and environmentally, must respect the needs of future generations as well as succeeding now. This is the key to lasting, rather than temporary, solutions; to creating communities that can stand on their own feet and adapt to the changing demands of modern life. Places where people want to live and will continue to want to live." Sustainable communities: building for the future

Good accessibility is central to the creation of sustainable communities. The Government’s Sustainable Communities Plan - a major programme for improving new and regenerated communities and housing across the country - acknowledges this. It emphasises the need for communities to be "well connected", with facilities to encourage safe walking and cycling, the provision of good public transport and easy access to high quality services. Steps taken now to make new developments more accessible in a sustainable manner will influence the travel patterns of these communities far into the future. They should also help reduce pressure of additional traffic on surrounding roads, while creating more attractive and liveable neighbourhoods.

A residential travel plan is an important tool for delivering accessible communities. The value of travel plans for workplaces and schools is now widely accepted and many local authorities and developers have some experience in their design and implementation. Mechanisms have evolved to facilitate travel planning, such as the employment of dedicated travel plan officers and the production of detailed supplementary guidance.

The scope for applying travel planning principles in new residential developments is now being explored, with a number of local authorities currently requiring and supporting residential travel plans. The benefits to developers and new residents are apparent. Future residents are likely to be attracted by sites which offer a wide range of transport benefits and an environment where the intrusion of cars and traffic is minimised. Developers can gain from the kudos of leading the field in sustainable construction, as well as the green marketing potential offered by developments supported by such plans.

A key driver in promoting travel plans for both workplaces and schools has been the potential for securing these through the planning process. National guidance contained in PPG 13: Transport ² requires that planning applications with significant transport implications should be accompanied by a travel plan. As with workplace travel plans, residential travel plans are being secured through the use of the planning system and there is a range of guidance and experience on which to draw. Sustainability policy objectives in **PPS1** ³ and the **Revised Circular 05/2005 on Planning Obligations** ⁴ form the basis of the policy framework within which residential travel plans can be negotiated.
The national sustainability agenda and modernisation of the planning system have reinforced the important and positive role that travel planning, including for residential development, can play in achieving a wide range of national and local objectives. These include:

- Helping to reduce the need to travel and to cut congestion;
- Supporting mixed community and housing objectives, including development location, density, design and parking;
- Helping address the causes and potential impacts of climate change through reducing energy use and reducing emissions;
- Supporting social inclusion objectives, particularly through improvement of accessibility to and from new development;
- Encouraging integrated policy development, particularly between the Local Transport Plan (LTP) and Local Development Framework (LDF);
- Providing a mechanism through which ongoing sustainability appraisal and integration can be built into planning and implementation arrangements.

Achievements of travel plans

Research, both in the UK and internationally, has evaluated the impact of workplace travel planning on commuter travel patterns and considered the likely success factors for reducing car use. In 2002, a Department for Transport (DfT) study examined the achievements of travel plans from 20 UK organisations and found, on average, that these organisations experienced an 18% reduction in the proportion of commuters driving to their sites in the wake of travel plan implementation. These findings were further confirmed by the DfT’s 2004 Smarter Choices report which highlighted the potential impacts of a range of ‘smart’ measures. Reported benefits of travel plans included helping to cut congestion, relieving parking pressures, making sites more accessible, improving staff travel choice and aiding retention. Travel planning is therefore an important component of national and local strategies to reduce traffic and so cut CO2 emissions contributing to climate change.

Residential travel plans are no exception. They can provide a key mechanism for ensuring that sustainable access is in place from the earliest stages of development. They are also important in clarifying how the various parties (including the developer and future occupiers) can work together in partnership to encourage sustainable travel patterns. Many of the factors that have been found to be important in the success of workplace travel plans could be expected to apply to residential travel plans. In terms of measures this might include, for example: parking management, promotion and awareness raising, and achieving good links between the site and the wider cycle, walking and public transport network. In terms of process, appointment of a travel plan co-ordinator or allocation of responsibility to a named person, taking a site specific approach and partnership working between the local authority, developer and public transport operators, are all likely to be important in a residential setting.

About this guide

This guide was commissioned by the Department for Transport, in consultation with the Office of the Deputy Prime Minister, to bring together emerging principles of good practice and to identify issues that need to be taken into account in developing residential travel plans and securing them through the planning system. The guide is aimed at the practitioners involved in this process, including local authority
highways and planning officers, property developers and consultants.

The guide seeks to bridge the gap between existing advice on the physical layout and location of development (e.g. planning and design guidance) and that on managing the resulting travel patterns (e.g. through Local Transport Plans). It draws on research into the success of workplace and school travel plans, and on the experiences of securing residential travel plans in six local authorities from different parts of the country, representing varying economic, development and transport circumstances. It is complementary to the generic guide produced in 2002 jointly by the Department for Transport and the Office of the Deputy Prime Minister, and should be used in conjunction with it.

The authorities and developers involved in our main case studies, who are at the forefront of promoting residential travel plans, were as follows:

- Queen Elizabeth Park, Guildford: Surrey County Council and Laing and Linden Homes
- Grand Union Village, West London: London Borough of Ealing, London Borough of Hillingdon and Grand Union Vision Limited (Taylor Woodrow and Bryant Homes)
- New England Quarter, Brighton: Brighton & Hove City Council and QED
- High Royds, Leeds: Leeds City Council and Raven Group
- Poole Quarter, Poole, Dorset: Borough of Poole Council and Crest Nicholson
- Seldown, Poole, Dorset: Borough of Poole Council and Western Challenge Housing Association
- Plough Lane, Wimbledon, London: London Borough of Merton and David Wilson Homes

We are very grateful to all those who shared their experience by taking part in the study.

The guide reflects the developing nature of residential travel planning, and the fact that experience in this area is at an early stage and will grow in future. It aims to provide useful advice now to encourage wider use of residential travel plans to achieve sustainable development. It is not, however, definitive on all issues in view of the emerging nature of practice in this area. As policy and practice on residential travel planning evolves, further work may be needed to expand on this experience.

The guide has six chapters.

1 Residential travel plans - potential and policy context - looks at how residential travel plans are different from other travel plans, explores the benefits they can offer and sets the context in terms of related policy issues;

2 Travel plan design and content - outlines objectives and guiding principles, and the measures that can be secured as part of a residential travel plan;

3 The process of requiring a residential travel plan - covers the key stages in the residential travel planning process;

4 Management, monitoring and enforcement - highlights key issues to be taken into account to ensure the travel plan is effective and continues to be effective;

5 Strategic framework - reviews the planning and transport framework which ideally should underpin an effective residential travel plan;
6 Concluding messages - explains what can be done by both local authorities and developers to deliver effective travel plans, and draws together the key messages.

1 Sustainable communities: building for the future, Office of the Deputy Prime Minister, 2003


3 Planning Policy Statement 1: Delivering Sustainable Development, Office of the Deputy Prime Minister, 2005

4 Circular 05/2005: revised guidance on planning obligations. Office of the Deputy Prime Minister, 2005

5 Making travel plans work: lessons from UK case studies, (Good practice guide and research report) Transport 2000 Trust, University College London and Adrian Davis Associates, Department for Transport, July 2002

6 Smarter Choices â Changing the Way We Travel, Sally Cairns, Lynn Sloman, Carey Newson, Jillian Anable, Alistair Kirkbride and Phil Goodwin, Department for Transport, July 2004


1. Residential travel plans - potential and policy context

A residential travel plan is a package of measures designed to reduce the number and length of car trips generated by a residential development, while also supporting more sustainable forms of travel and reducing the overall need to travel.

Travel planning to date has largely focussed on the development of destination travel plans, which are generally designed to reduce car use to a specific destination - such as a workplace, school or a visitor attraction. Originated by the employer, the school or the attraction itself, in partnership with others such as the local authority and public transport operators, destination travel plans focus mainly on a particular journey purpose.

By contrast, a residential travel plan is concerned with journeys made from a single origin (home) to multiple and changing destinations. This crucial difference raises a number of issues and explains the need for specific good practice advice, though many aspects of good practice in developing destination travel plans are likely to apply to residential travel plans.

Key differences between the origin-based residential travel plans and destination travel plans are:

- The pattern of journeys originating at home is more varied, with residents having multiple destinations and different needs and travel choices over time. This is a crucial difference compared with destination-based plans which normally only deal with a single journey purpose (e.g. access to work);
- An ongoing management organisation and structure for the travel plan needs to be put in place, as there is often no single company or institution to provide continuity and a common point of interest
This guidance looks at residential travel plans in the context of new development, where the travel plan will normally be drawn up before the residents are in occupation.

It is envisaged that the measures included in a residential travel plan will include demand management and smart travel tools, as well as improvements in services and facilities. As with destination travel plans, it would generally combine the ‘soft’ measures of promotion and awareness raising with ‘hard’ measures and improvements to design, infrastructure and services, both on site and off-site. In addition, because of the many purposes of journeys from home, the residential travel plan may need to incorporate a wider range of measures to encourage more sustainable travel choices. It will need to be "fit for purpose" given the substantial variety of scale, location and type of residential development.

A residential travel plan should also include targets, monitoring and management arrangements to ensure that the objectives of the travel plan are achieved and that it remains sustainable over the longer term. It should be secured through the planning system as part of the assessment of the planning application. As with other travel plans, residential travel plans should be a key requirement (on a par with highways improvements or instead of them) for any residential development likely to generate significant levels of traffic. They should not, of course, be a reason for approving an unacceptable development in the wrong location but, where practical, providing a means of solving accessibility issues.

**Potential of residential travel plans**

Travel planning for residential development has potential to help achieve more sustainable communities by improving their accessibility. New housing development is normally characterised by high car trip generation. However, better choices about the location and density of new housing, combined with the increased use of residential travel plans, should deliver a real impact on travel patterns and aid progress towards sustainable transport and land use objectives.

If the travel plan is designed into the residential development from the beginning and supported by a long term commitment and mechanisms for implementation, potential local benefits (in addition to the strategic objectives listed above) include:

- Reducing the need for car use with benefits in terms of reduced traffic, congestion, air pollution and accidents;
- Improving accessibility and travel choice for reaching local facilities;
- Improving public transport provision for people in nearby developments because of the increased economies of scale;
- Increasing scope for child-friendly housing layouts with fewer roads, vehicle movements and parking areas;
- Complementing nearby travel plans, and possibly even assisting them in achieving more ambitious initiatives;
- Improving access by the wider community to the residential development by sustainable modes of transport;
- Representing good practice and providing an educational tool to help change perceptions about the convenience and benefits of not using the car where alternatives exist;
- Achieving more attractive environments that contribute to regeneration and renewal initiatives;
Increasing marketability of the development as more households seek to change their travel behaviour.

Residential travel plans are likely to achieve the greatest impacts in relation to larger residential developments (i.e. over 100 dwellings), though smaller schemes may offer scope where benefits address local issues, complement other developments and/or cumulatively work to change travel patterns. In the first instance attention should be paid to those developments likely to generate substantial traffic flows if there were no travel plan and/or where there are congestion or accessibility difficulties.

Travel plans can also make an important contribution towards influencing travel behaviour in rural locations. Previous studies have found (in relation to destination travel plans) that organisations based in rural or green field areas performed well in terms of achieving modal shift, though end levels of car use were generally higher. They indicate that a remote location is not a reason for accepting unsustainable levels of car use. Where new residential development is appropriate in planning policy terms, it will be important to tailor the travel plan in terms of design, measures and the overall provision for cars on site, to promote more sustainable travel behaviour.

This guide suggests that there are a range of approaches to achieving sustainable transport objectives in housing developments depending on the nature of the development. For schemes with fewer transport implications this might comprise the development of a number of different transport measures, though not a fully-fledged plan. However, for major applications and major developments the requirement should be for a comprehensive residential travel plan with a range of strategies and measures for influencing residential travel behaviour supported by targets and provision for future monitoring, management and enforcement.

**Policy context**

Both the new planning legislative context and the revised guidance for Local Transport Plans 8 (LTPs) have broadened the range of issues that local policy must address.

Recent planning legislation places greater emphasis on sustainability and spatial issues, and the national and local planning context also provides a framework for the development of residential travel plans. *Planning Policy Statement 1: Delivering Sustainable Development* 9 outlines the key principles that should be applied to ensure that development plans develop effective local spatial strategies and decisions taken on planning applications contribute to the delivery of sustainable development.

LTPs are now expected to demonstrate their contribution to delivering a set of ‘shared priorities’ for local transport which include: improvement of access to jobs and services, particularly for those most in need, in ways that are sustainable; improved public transport; and reduced problems of congestion, pollution and safety. In addition, the guidance requires LTPs to address wider quality of life issues such as healthy communities, neighbourhood renewal, the quality of public spaces, better streetscapes and the UK’s targets for reducing the emissions of greenhouse gases.

The LTP guidance recognises the contribution to reducing traffic congestion achieved by ‘smart’ interventions such as school and workplace travel planning. It includes key outcome indicators for which measuring and reporting are mandatory, including locally relevant targets related to accessibility, road casualty reduction, public transport patronage, congestion, air quality and effective asset management.
The need for a residential travel plan is likely to emerge through the process of considering the transport assessment in relation to a planning application. This, together with a range of related issues that the development control process also needs to address, will be relevant to residential travel plans. These issues include social inclusion, accessibility, regeneration, safety, the provision of affordable housing and sustainability.

Residential travel plans are likely to cut across a wider range of policies and interests than workplace travel plans, and an integrated policy approach will be an essential ingredient of success. In preparing the policy context, close liaison between different sections of the local authority will be required - not only to ensure consistency between the Local Transport Plan/Accessibility Strategy and Local Development Framework, but also to ensure that travel plans reflect other strategies and initiatives.

Policy integration and 'joined up' implementation also necessitate the involvement of third parties in residential travel planning. Local authorities and developers should arrange for appropriate input from a range of agencies including other travel plan coordinators, public transport operators, other local planning authorities, local education authorities, Primary Care Trusts, Jobcentres and local Learning and Skills Councils.

**Strategic process**

The potential for achieving an impact with residential travel plans will be maximised by the identification and application of good practice in relation to key aspects of the strategic process, namely:

- Establishing a clear policy framework;
- Providing current and comprehensive data bases on, for example, traffic, public transport use, accessibility, housing need/market;
- Ensuring positive attitudes by both local authority officers/members and applicants/developers;
- Encouraging positive liaison with public transport operators;
- Establishing relevant partnership arrangements;
- Involving residential travel planning expertise at the earliest opportunity;
- Careful legal documentation to secure the residential travel plan;
- Commitment to monitoring and enforcement.

Internal local authority processes are also important. Residential travel plans will benefit from close working between different disciplines and proactive communication within authorities. Key players include: the travel plan officer and traffic engineers, the LTP officer and planning and housing officers. The development control negotiation and decision-making process needs to be consistent and timely, with all parties clear as to their responsibilities. The process needs to have continuity over time, facilitated by such measures as setting out detailed policies in Supplementary Planning Documents, published section 106 procedures, and provision of common software access to databases for monitoring.

Similarly, applicants and developers can assist the strategic process through ensuring travel planning issues are addressed early in the process - i.e. when the location of developments is under consideration - and that involvement of the local authority and other relevant parties also is undertaken at the earliest possible stage. The 2002 guidance *Using the planning process to secure travel plans - Best Practice guide* includes several sections that provide further detail on these aspects of good practice.
Both the local authority and the developer need to work in partnership to secure the most appropriate outcome for the site from all perspectives.


9 Planning Policy Statement 1: Delivering Sustainable Development, Office of the Deputy Prime Minister 2005


2. Travel plan design and content

This chapter looks at the issues to be addressed, and the range of provision that could potentially be secured from the developer, as part of a residential travel plan. The design and content of the plan will be guided by the objectives and principles below.

Objectives

The main objectives of a residential travel plan are to:

- address residents’ need for access to a full range of facilities for work, education, health, leisure, recreation and shopping. In some cases this will mean providing facilities that reduce the need to travel, such as a local shop.
- reduce the traffic generated by the development to a significantly lower level of car trips than would be predicted for the site without the implementation of the travel plan. However, the residential travel plan should not provide grounds for permitting unacceptable development in the wrong location.
- promote healthy lifestyles and sustainable, vibrant local communities.
- encourage good urban design principles that open up the permeability of the development for walking and cycling linked to the design and access statements.
- address specific problems identified in the site’s Transport Assessment - for example, a road safety problem that prevents children or older people from gaining access to key facilities.

At individual sites, one or other of these objectives may carry more weight. For example, in areas where there are few problems with congestion, providing good access to services and facilities may be considered the first priority. Deciding on these priorities is helpful, since it can affect the emphasis placed on different measures.

It is also important to set targets for achieving these objectives and monitor progress towards meeting them. Target setting and monitoring are discussed in Chapter 4.

Guiding principles

The following key principles are helpful in deciding on the choice of measures for individual plans.
Residential travel plans:

- Are site specific - the detailed choice of measures will be partly determined by the opportunities and constraints offered by the site, for example, the location of existing public transport routes, health facilities and workplaces in the immediate area. They are therefore unique to the site and not a standard combination of measures.
- Combine the 'hard measures' - of site design, infrastructure and new services - with the 'soft measures' - of marketing, promotion and awareness-raising among residents.
- Provide a holistic package in which individual measures are integrated into the design, marketing and occupation of the site rather than 'retrofitted' once the development is established. The measures should aim to achieve more sustainable travel patterns from the outset, rather than cutting car use incrementally once the residents are in occupation.
- Include measures to support walking, cycling and public transport use.
- Include parking restraint. A degree of parking restraint is likely to be critical to the success of the plan in reducing car use. It follows that the introduction of a travel plan should never be treated as justification for approving more generous parking: the parking level is itself an important measure in the plan.

The measures used in residential travel plans should capitalise on any potential synergies with successful local authority initiatives and partnerships - for example, an authority that is already engaged in a large scale project offering travel advice to individual households will be well placed to extend this service to the new development (with a contribution towards any additional costs from the developer).

Where appropriate, residential travel plans can include provision or promotion of other types of travel plan - for example, where there is an office or school within the mixed use site there may be arrangements for these organisations to submit individual workplace/school travel plans linked to an umbrella travel plan for the predominant use.

The travel plan pyramid

It may help to view the travel plan as a pyramid of measures and actions, some of which may form the foundations of the travel plan and part of which will be the outcomes from the transport assessment. At its base, and underpinning all the other aspects of accessibility of the site, is the choice of location, including proximity to existing facilities and services.

The next level comprises the fundamental characteristics that need to be incorporated into the design of the site from an early stage in order to reduce the need to travel and support walking, cycling and bus use, including achieving appropriate density and the incorporation of key facilities. The new requirement for design and access statements - which is due to become a requirement within the planning application process later in 2005 - will provide a key input to this level.

Next to be put in place is the resource to facilitate and develop the measures in the plan (for example, a travel plan co-ordinator or nominated person incorporating the function).

At the next level are the services that will need to be obtained for the site - such as public transport services, especially buses, and a car club - together with the development of any subsidiary or inter-related travel plans for workplaces and schools within the site.
At the top of the pyramid is promotion, marketing and awareness raising to ensure adequate take-up of these services and to communicate the travel plan to residents. Ideally, all the building blocks of the pyramid will be in place to ensure the success of the travel plan.

**Diagram 1: Travel plan pyramid**

*Top tier*
Marketing, promotion,
Awareness-raising

*Next tier:*
Car club, other services, public transport
Parking management, sub-site travel plans

*Next tier:*
Co-ordinator to develop further measures

*Next tier:*
Parking restraint, facilities that reduce the need to travel
Site design, suitable density and amenity

*Bottom tier:*
Location -- proximity to existing facilities and services

**Travel plan measures**

Checklist 1 below summarises the wide range of measures included in the case studies reviewed. It is not suggested that each plan should include all of these measures, but that they should all be considered, in the context of the specific development and in the light of the objectives and principles outlined above. The choice of what is relevant and necessary for the site should flow from the transport assessment and design and access statement.

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<th>Checklist 1: Measures/issues to be considered for residential travel plans (depending on site assessment)</th>
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<td><strong>A: Site design</strong></td>
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<td>Permeability for pedestrians and cyclists</td>
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<td>Highways safety measures/traffic calming/pedestrian and cycling friendly infrastructure</td>
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<td>Site speed limits</td>
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<td>Restrictions on car movements within the site</td>
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<td>Parking restraint (or potential for car-free site)</td>
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<td>Minimising intrusion from parking (where applicable)</td>
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<td>Checklist 1: Measures/issues to be considered for residential travel plans (depending on site assessment)</td>
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<tr>
<td>Areas for social exchange, recreation, seating, play, and biodiversity</td>
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<td>Cycle parking</td>
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<tr>
<td>Cycle shower and changing facilities in site workplaces (if applicable)</td>
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<tr>
<td>Bus routing: ensuring the road design allows the bus to reach all parts of the development and that it connects well with the surrounding area.</td>
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<tr>
<td>Bus infrastructure such as stands, stops, shelters, bus gates and real time information (where services will be entering the site)</td>
</tr>
<tr>
<td>Adoption of home zone principles or home zone features (option to be considered)</td>
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</tbody>
</table>

**B: Improvements to off-site access (as required in the light of existing provision)**

| 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 |

**C: Facilities that reduce the need to travel (as required in the light of existing provision)**

**Health**

| Education / childcare |
| 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, tele-centre |

**Leisure**

| Community |

**D: Public transport improvements (as required, in the light of existing provision)**

| New or enhanced bus services |
| New or enhanced rail services |
| Facilities to improve interchange (e.g. cycle parking/ lockers at stations) |

**E: Car club**

| Service established on site |
| Parking bays allocated |

**F: Other services to support sustainable travel (options to be considered)**
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<th>Checklist 1: Measures/issues to be considered for residential travel plans (depending on site assessment)</th>
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<td>Home delivery grocery service and refrigerated drop-off points on site</td>
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<td><strong>G: Parking management scheme (recommended if parking demand exceeds supply)</strong></td>
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<td><strong>H: Promotion and awareness raising package (selection from the following options should provide financial incentives for use of sustainable travel and include face-to-face engagement with new residents)</strong></td>
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**Site design**

Encouraging sustainable travel in new developments is not just about journeys made to and from the site, but the fine grain of people’s movements and interactions in their own neighbourhoods, the opportunities for spontaneous exchange and the extent to which social space is protected from traffic. The design and access statements shortly to be required as part of a planning application will be a key consideration for the travel plan and vice versa 11.

Site design has a highly influential role to play in fostering community vitality by enabling residents to move easily and safely on foot and by bicycle, facilitating bus movement through the site and by minimising the dominance of private vehicles. An important element of site design is the overall density of the development. Government planning policy (e.g. *PPG3*) encourages developments at densities of 30 dwellings per hectare (net) and above when developed with good design and amenity space. It is widely acknowledged that achieving appropriate densities in new well-designed development is important in ensuring the efficient use of land and compact neighbourhoods which can sustain local services and public transport.

In addition, the design of housing units can help to reduce the need to travel. Examples include the provision of home office/workshop space to enable home working, and of refrigerated drop-off points on site to encourage home deliveries.
Safe for walkers and cyclists

It is essential that the design incorporates good quality, safe and comfortable walking and cycling routes, and that the layout is ‘permeable’ to those on foot or bicycle. For example, do walking and cycling routes follow ‘desire lines’ through the site? Do they connect, conveniently and clearly with the off-site walking and cycling network, to provide access to the places that people want to reach - including nearby schools, employment sites, parks, shopping and leisure facilities?

Traffic management measures

Safe crossing facilities, traffic calming and other junction improvements help to create a safer environment for vulnerable road users, both within the development and on key walking and cycling routes serving the site. Lower vehicle speeds make areas safer for everyone, but especially for children, and can be achieved through the introduction of an area-wide 20mph zone. Vehicle movements can also be restricted through the use of barriers, to avoid through-traffic and rat-running.

Social space

The site design should make generous provision of dedicated space for social exchange and recreation - for example, an area that provides a focal point for the community with seating and public art, children’s play areas, usable green spaces, sports grounds, allotments, woodland and nature conservation areas. This kind of provision can help to counteract any perception of the development’s public areas as landscaped car parking. Consideration needs to be given to the potential for older people to find attractive sitting space close to their houses that offers more than a view of the car park.

Unobtrusive car parking

Parking provision for cars should be as unobtrusive as possible, and should not dominate the visual appearance of the site. Parking areas should ideally be tucked away rather than in front of houses, for example, in courtyards behind buildings (where cars will be less visible but will still be overlooked). Any more visible parking should be well landscaped and should not block cycling or walking access to the property. Parking standards should reflect the aspirations of the travel plan for low car use.

Cycling infrastructure

Sites should include secure cycle parking, conveniently placed for visitors, residents and workplaces. For example, Sheffield stands for visitors in front of houses, offices and shops; covered lockable cycle storage for residents’ homes and employment sites. All cycle parking provision needs to be conveniently close to main entrances/front doors. Cycle shower and changing facilities should be incorporated into worksites on the development and conveniently located - e.g. just inside the entrance. Further guidance on cycling can be found in publications such as Walking and cycling: an action plan, DfT, 2004.

Bus infrastructure

Site designs should also include the provision of appropriate bus infrastructure, such as bus stands, stops and shelters at the site and on bus routes serving the site. The position of bus stops in relation to bus routes and the routes themselves will need to be determined in liaison with public transport officers. Locating
bus stops where they are overlooked by housing can help to deter vandalism. Stops should incorporate bus timetable and route information. Branding individual stops with location names (e.g. "The Crescent") makes public transport more legible for residents and assists in providing clear public transport information. Some developments have included real time bus information both at the bus stop and directly available as a visual display in residents’ homes.

The use of bus gates and bus priority measures can help to facilitate the through-travel of buses. Again this needs to be determined in relation to other provision for public transport access to the site.

Good practice - accessible by design

Many aspects of site design at Poole Quarter, in Poole, Dorset, are intended to create a pedestrian- and cycle-friendly neighbourhood and encourage sustainable travel. The 512-home development by Crest Nicholson will have a central focal space, located on a pedestrian and cycle path that provides a central avenue through the site. The route, which will be well-lit and easily seen, gives pedestrians and cyclists priority over the private car and is expected to encourage residents to walk or cycle to workplaces and other destinations in the town centre.

Signposts at key points throughout the site will facilitate the easy movement of those on foot and a road that cuts through the development will have a toucan crossing for walkers and cyclists. Secure cycle parking for residents and visitors is distributed across the site. The developer will fund a cycle link between the site and a nearby recreation area and provide new bus stops and shelters on the nearby bus route. Play areas are to be created within the development, both in the central focal space and in housing courtyards.

Incorporation of a home zone or home zone features in site design

A home zone is a residential street (or group of streets) where the living environment clearly predominates over any provision for traffic, and where the design provides space for motor vehicles but fully accommodates the wider needs of residents. Street design, landscaping and highway engineering all play a role in controlling vehicles and encouraging speed restraint, with the aim of making motorists perceive themselves as guests in a pedestrian environment.

The incorporation of a home zone (or of some home zone features) in a new development could be included as part of a residential travel plan. The potential for such opportunities needs to be considered at an early stage to ensure that they are compatible with the overall design of the site. Among the case studies, some authorities that tried to secure home zones found that architectural solutions already incorporated into proposals could make this difficult to achieve. In future the design and access statements will need to consider these issues. A marked difference between new-build home zones and those established in existing neighbourhoods is that there is not usually scope to involve prospective residents at the design stage.

Key principles of home zone design are:

- Where possible, there is no distinction between the road and the pavement;
- Parking and landscape features are used to avoid vehicles driving too close to residential properties, with front gardens included or retained where possible;
- Integration of signage, landscaping and street furniture to avoid visual clutter;
Clear demarcation between the home zone and more traditional streets;
Avoidance of lengths of carriageway which encourage drivers to assume they have priority and achieve unacceptable speeds;
Provision of adequate parking within direct vicinity of people’s homes;
Careful location of seating, which can be controversial if it is close to individual houses.

Clearly, some of these features could be incorporated into a residential development that was not a home zone. The features that belong most distinctly to the home zone concept are the use of a shared surface for the footway and carriageway and the recommended design speed of 10mph.

**Good practice - home zone**

Seldown is a high density residential development at Poole in Dorset, which combines eco-friendly housing with a home zone design: a shared access surface, which accommodates both people and cars, uses hard paving without gutters or a defined road alignment to provide informal recreational space. Individual parking areas are not marked out, while items of street furniture such as benches have been positioned to slow vehicles to less than 5mph.

The aim is to maximize the space available for play and social exchange and to give people priority over cars. The Borough of Poole’s aspirations for the site were spelt out to the developer in a design brief that was attached to the land. The brief itself was initially derived from a competition, in which the authority invited submissions from urban design companies. In addition to being a home zone and an eco-development, Seldown has a residential travel plan that includes a parking management scheme.

**Improvements to off-site access**

In some cases on-site design measures will need to be complemented by off-site improvements if they are to be effective in providing good access to local facilities.

Possible measures include:

- Road safety improvements to highways infrastructure serving the site - for example, improvements for vulnerable users at key junctions and crossings; traffic calming on key routes serving the site; safe routes to school.
- Creation and enhancement of new cycling and walking routes serving the site, for example, the introduction of a footbridge; a new link to the rest of the cycle network.
- Provision of off-site bus infrastructure such as stops and shelters, and the introduction of bus priority on bus routes serving the site.

The site’s transport assessment should identify the location of key facilities and routes serving the site, and highlight the weak links and barriers that need to be addressed.
Facilities that reduce the need to travel

In some areas, the distance between people’s homes and key facilities such as post offices, food shops and chemists has increased as local facilities have closed, with a resulting growth in car use. By contrast, where facilities are provided within a development, people are more likely to walk to them than to drive elsewhere. Research shows that a local newsagent, for example, will absorb two thirds of all newsagents’ trips 13.

New housing should be designed to be within a few minutes walk of shops, post offices, banks, schools, pubs and other everyday facilities. Where these are not already in existence, or are too small to provide additional capacity, they should be included as part of the new development as far as possible. Government guidance says that, outside urban areas,

"any substantial new development, whether a town extension, village expansion or new settlement should not consist exclusively of housing but must be planned as a community with a mix of land uses, including adequate shops, employment and services." 14

In preparing the transport assessment and the travel plan, specific consideration should be given to how residents will access facilities for:

- Health, e.g. GP and dental surgeries, chemist;
- Education/childcare, e.g. nursery, primary and secondary schools;
- Shopping/personal business, e.g. food shops, convenience stores, post offices, banks, availability of home delivery services or mobile shops; provision of cool storage in communal areas of buildings to facilitate home delivery of groceries;
- Employment, including access to major centres of employment and facilities available for working at home, e.g. live/work space, broadband, telecentre;
- Leisure and recreation e.g. playgrounds, parks, sports grounds, leisure centres, libraries, arts centres, allotments, pubs, cafes;
- Community, e.g. community meeting places and drop-in centres.

As part of the Local Transport Plan, local authorities are required to prepare accessibility strategies, underpinned by accessibility assessments for the area. Information gathered for these is likely to be helpful when assessing the existing facilities that would serve a new development.

The travel plan can ensure that gaps in provision are addressed by the developer where relevant to the development, for example:

- By incorporating key facilities in the design of the development;
- By funding measures to improve access on foot between the site and nearby facilities;
- By agreeing to procure key services and facilities on the site, for example, a mobile shop or sports hall.
Good practice - facilities on the doorstep

At Queen Elizabeth Park, in Surrey, 525 homes are being built on the site of a former barracks in an existing residential area. The choice of location means there are already schools, workplaces, shops and leisure facilities that will be within easy reach for the new residents. Developed by Laing and Linden Homes, Queen Elizabeth Park also incorporates new facilities that will reduce the need to travel, including office space, light industry, a crèche, a health and fitness centre and a community core with shops.

At High Royds, Leeds, 541 homes together with office space are being built at the site of a former mental hospital. The hospital’s extensive grounds, with gardens, woods and sports facilities, will be opened to the public, providing recreational space for both new residents and existing communities. The development incorporates space for offices, a children’s nursery, a GP and dental surgeries and a small shop, ensuring that residents can meet many everyday needs without leaving the site. The developer, Raven Group, has also agreed to procure a sports and social club on site.

Public transport services

Ensuring good accessibility by bus and rail will be a key element of the travel plan for any new development. It is also an important selling point for new housing. In the National Travel Survey, nearly a quarter of people said the availability of public transport was very important when choosing a home, while a further fifth said it was fairly important.  

Public transport improvements secured from developers in our case study research included:

- Enhancements of existing bus services, for example: increased service frequency; diversion of existing services to enter the site or run very close to it; upgrade in quality of vehicles;
- Provision of new frequent shuttle services from the site to key destinations such as town centres and railway stations;
- A contribution toward the cost of rolling stock to increase rail capacity on a railway line serving the site.

New services need to be carefully tailored to the requirements of the site, providing access to key destinations such as shopping centres, employment sites, and public transport nodes.

Services should be well supported by the on-site and off-site public transport infrastructure mentioned earlier: bus stands, stops and shelters, bus priority systems and real-time information. It is important that infrastructure and services are planned in tandem - it is not unheard of for developments to be equipped with bus stops but no services! In addition, there are occurrences where the road design of a site has physically prevented bus access due to its inappropriate layout. Arrangements should be made in consultation with local authority public transport coordinators and public transport companies. The ability of the site layout to accommodate bus movements should be included in pre-application negotiations and assessed by transport operators before designs are finalised. Existing and new residents must be aware of the proposed route.
Services should also be supported by effective marketing, as part of the wider package of promotional and awareness raising measures for residents. Research suggests marketing initiatives for public transport are at least as important as service improvements in attracting passengers. 

In some cases the developer has been required to provide whatever subsidy is necessary to fund the bus service for a given period (e.g. five years) whilst also promoting that service to residents. This can work well in that the developer has an inbuilt incentive to promote the bus vigorously enough to cut the subsidy.

**Good practice - providing key connections**

Residents at the new High Royds development on the edge of Leeds will be encouraged to commute into the city by train, making use of a new, frequent, free shuttle bus running morning and evening to nearby Menston rail station.

The bus, to be funded by the developer, Raven Group, will also make journeys during the day to local shopping centres. An extra vehicle will be provided if needed. The development is to be equipped with on-site bus shelters and real time information. The site layout will allow existing bus services to be diverted through the development with the help of bus gates, while cars are unable to cut through.

To promote the service, Raven Group will provide each household with a free one year bus/rail pass, while the passenger transport executive Metro will give residents discounts on tickets after that, at 25% for the second year of occupation and 10% for the third. In addition, the developer is contributing £300,000 towards new rolling stock as part of a bid by Metro to increase rail services at peak times.

The measures aim to keep pressure off the congested A65.

**Car club**

For many residential travel plans a car club is likely to be a key component and an important corollary to parking restraint. The basic idea of a car club is that people can have access to a car in their neighbourhood without having to buy or maintain their own vehicle. Residents typically pay an annual membership fee (around £100-£200) to an operator who provides and maintains a range of vehicles in the immediate area. Members then pay by the hour and mile when they use a vehicle. Bookings can be made at very short notice. The combined costs of membership and use are intended to be cheaper than personal car ownership for drivers who do not have a high mileage rate, and to encourage people to choose alternative forms of transport more often. In this way car clubs can make it feasible for households to forego a second car, if not a first one.

Research has shown that car club members who give up a car are likely to reduce their car mileage by around 60-70%. The average change in mileage for all car club users is a reduction of 33%. This takes into account those joining the club who did not previously own a car and those who use the car club to have access to a second car. 

Developers can be required, as part of a section 106, to ‘use all reasonable endeavour to establish the car club’. This may entail pump-priming the scheme with an initial sum and maintaining it for a period of time through, for example a contractor. Other steps that can be taken to facilitate the process include:
- Offering office space on the site at favourable terms to a potential or existing local car club provider (such as a car hire company) on condition that they provide a car club service to residents;
- Providing dedicated car club parking spaces distributed across the site - more spaces will be required as the club grows;
- The inclusion of car club membership in the wider promotional package offered to householders.

The minimum size of development to support a stand-alone, viable car club is 250 units. A club could be considered for a smaller development if it could be integrated into the wider neighbourhood so that it served other residents and businesses. This is also advisable for larger developments. In developments of less than 200 units, consideration should be given to the use of section 106 contributions to expand an existing car club in the locality. In general, finding a car club provider is likely to be easier where the authority already has schemes that are successfully established. A briefing on funding car clubs through section 106 agreements is available from CityCarClub.18

### Good practice - kick-starting a car club service

In the London Borough of Merton a city car club is to be established as part of a new residential development at Plough Lane, Wimbledon. A local car hire company has been invited to move into a business unit on the site, and to run the car club as part of its rental there. The developer, David Wilson Homes, agreed through the section 106 to procure the car club and identify suitable accommodation for it within the site. The developer will also provide funding for every household to have a free year’s membership of the car club and an induction session where they find out how the scheme works. Under the agreement, the developer’s financial liability for establishing the scheme cannot exceed £95,000.

At Poole Quarter in Poole, Dorset, developer Crest Nicholson is committed to establishing a car club through a section 106 agreement, and there are plans to grow the scheme as occupation of the new development expands. A sum of £35,000 has been budgeted within the travel plan for setting up the service. The site layout provides space for up to five dedicated parking spaces for car club vehicles, and the demand for further parking provision will be closely monitored.

The Grand Union Village development in West London will have its own dedicated car club with establishment and operation costs subsidised for the first five years by the developer up to £100,000. The scheme must be in place when 133 dwellings are occupied and will include subsidised membership for the first 300 residents. Cars will be parked in reserved bays and bookings will be possible weeks or minutes in advance with users billed monthly for use. If the scheme ceases or is not established during the first five years from the commencement of development, the section 106 specifies that unused contributions can be diverted through the council to other schemes designed to reduce the number of journeys made to and from the development. In addition, residents will be able to access the West London Car Share website.19

### Other services to support sustainable travel choices

A number of other services may be helpful in supporting sustainable travel. For example:
A discounted taxi service can be a helpful complement to a car club since there are some circumstances where taking a taxi makes more sense than short term car hire, for example when the return journey will be several hours later. A taxi can also provide a failsafe option if public transport arrangements fall through. (Taxi trips should still be counted as car trips for monitoring purposes.)

- A cycle centre providing cycle repair services.
- Support in accessing a car share scheme.
- Provision of broadband, giving residents easy access to local home delivery services and to information on travel provided through community websites (see below) as well as making it easier for residents to work at home, as mentioned earlier.

11 Changes to the development control system à Second Consultation Paper, Office of the deputy Prime Minister March 2005


13 Compact but sustainable. J Winter, S Farthing & T Coombes. Planning Week, 8 June 1995, Pages 15 - 17


15 National Travel Survey information for 2002.

16 Smarter choices â changing the way we travel, Sally Cairns, Lynn Sloman, Carey Newson, Jillian Anable, Alistair Kirkbride and Phil Goodwin, Department for Transport, July 2004

17 Smarter choices â changing the way we travel, Sally Cairns, Lynn Sloman, Carey Newson, Jillian Anable, Alistair Kirkbride and Phil Goodwin, Department for Transport, July 2004.

18 Funding City Car Clubs through S.106 Agreements à Guidance for Officers, Updated April 2005, briefing available from CityCarClub, The Media Centre, Northumberland Street, Huddersfield HD1 1RL, 01484 483061, email: office@smartmoves.co.uk

19 www.citycarclubs.co.uk; http://www.bryant.co.uk/grandunionvillage

Parking restraint

Parking standards are likely to be a critical factor in the success of the travel plan in achieving low car use. Where there are more generous parking allowances it is likely to be more difficult to make the car club and public transport self-sustaining in the long term. Other forms of parking restraint - such as scarcity of parking at employment destinations and in the town centre - can also be expected to influence the success of the plan in reducing car trips.

Local authorities interviewed for this study had adopted varying degrees of parking restraint in residential areas. The lowest parking levels were on car-free housing developments, which had only minimal parking (e.g. spaces for disabled drivers and visitors) together with parking controls. In general, local authority decisions about how much parking to allow at specific developments are taken in the light of accessibility by public transport (though no new development should be located where the resulting public transport
access will be poor'). This is in line with Planning Policy Guidance Note 3: Housing, which says local authorities should:

"revise their parking standards to allow for significantly lower levels of off-street parking provision, particularly for developments in locations, such as town centres, where services are readily accessible by walking, cycling or public transport".

PPG 3 also says that authorities should recognise that car ownership varies with income, age, household type, and the type of housing and its location, and that less parking should be provided where demand is likely to be less. In addition, authorities should not set minimum standards and developers should not be required to provide more parking than they or potential occupiers might want.

A benefit of a lower parking allowance is that it can free up space for other development on the site. It can also help to encourage lower levels of car use by providing a disincentive to having a car, especially if this is a second car. There is a good rationale for this: on average, people in households with two or more cars travel more than 40% further each year than people in households with one car. 20

Ambitiously low parking standards can be contentious, making it all the more important that a comprehensive package of measures is in place to ensure sustainable travel choices are realistic. It also needs to be borne in mind that:

- The intention is not to restrain access to a car since this can be provided through the car club. In fact the car club will increase access to a car for those households that do not have personal ownership of a vehicle. The optimal parking ratio for a development supporting a car club is reported to be 0.8 or less. 21
- The need to use a car will be greatly reduced by complementary schemes to deliver much improved sustainable transport for the area as a whole, such as the availability of high quality bus services together with the implementation of travel plans by local employers.
- The design of residential developments will influence travel patterns far into the future, and has to take account of long term considerations for sustainability such as the UK’s commitment to combat climate change by reducing greenhouse gas emissions. 22
- Developments that dedicate less space to parking should have more space free for other purposes that benefit the community - for example, children’s play areas and communal gardens.

Good practice - parking restraint

In the London Borough of Southwark a maximum of 0.4 parking spaces per unit is permitted for residential development in the central zone. All developments in Southwark’s Controlled Parking Zones are required to be car free. Similarly the London Borough of Merton has policies that encourage proposals for car-free residential development in town centres and areas where there is an operational controlled parking zone. Under these circumstances CPZ orders will be used to prohibit the issue of residents’ parking permits to occupants.

Car free housing has been pioneered in the London Borough of Camden, where the local authority has signed planning agreements covering more than 2,000 car-free and car-capped dwellings since 1997. Developments take place where there are on-street parking controls in place, and residents are not issued with on-street residential parking permits. Planning obligations ensure that the same restrictions will be carried over to future occupants. The policy is now widely accepted within
Camden.

Managing parking

Where low parking allowances are implemented, a parking management scheme is likely to be needed to allocate spaces if demand exceeds supply. In some schemes residents are charged for parking spaces, with the revenue ring-fenced to pay for alternatives. Another option is for parking spaces to be sold separately from homes, so that they are not seen as being part of the intrinsic value of the building.

It is vital that the parking strategy is communicated to prospective residents from the outset, so that they understand the constraints on parking when deciding to live in the development and effectively ‘buy in’ to the parking conditions. Achieving ‘buy in’ is easier when the parking scheme is understood in the context of wider benefits from living in a relatively low-car development, including the greater amenity offered by the site.

Good practice - parking management

Residents at Seldown, a new eco-development in Poole, Dorset, have 0.7 parking spaces per home. The spaces will be allocated through a parking system at a charge. Owners of more environmentally friendly vehicles will pay half the rate, and parking revenue will be ring-fenced for sustainable transport measures. To support lower car ownership the housing association Western Challenge, which is developing the scheme, will provide a car club using two environmentally friendly vehicles with two dedicated parking spaces and an electric charging point. A controlled parking zone in the adjacent area is expected to prevent overspill parking.

In the London Borough of Merton, a suburban development of 570 flats being built by David Wilson Homes at Plough Lane, Wimbledon, has been allocated 0.78 spaces per dwelling. Parking, which is mostly underground, will be allocated at no more than one space per household.

Whether a development is low-car or car-free, on-street parking controls will be important to prevent overspill parking within the new development and in neighbouring areas. Existing residents are often concerned that a new development close by will mean more vehicles competing for scarce parking on their own streets. It is important to make clear what controls will be in place to prevent this from happening, or alternatively to spell out what actions will be taken (by whom and who will fund) if it does happen. A number of planning agreements have built-in scope for the local authority to introduce on-street parking controls or controlled parking zones (CPZ) if overspill parking results from the development. It is important to take account of the potential difficulties of implementing a CPZ through the traffic orders. Equally it needs to be explained that the purpose of restraining parking is to restrain car use, and so cut traffic generated by the new housing area.

Good practice - future introduction of a CPZ

For the Grand Union Village development in West London the planning agreement clarifies when and how a CPZ will be introduced if needed, including a developer advance to the local authority to cover associated costs. The authority may introduce parking restrictions and/ or a controlled parking zone (CPZ) within the period 2-10 years from the date of the Planning Agreement if it is found that people living, employed at or visiting the development park their cars on the street. If the developer can prove that the parked cars are from outside the development then this measure will
not apply; a parking survey was undertaken before the commencement of development to provide a base line. The developer will have to pay the local authority for the provision of the physical measures and subsidise the residents parking permits by 50% for five years should the CPZ be justified and implemented to minimise the impact on the resident’s in the short term. After 5 years residents will pay the full cost of permits. Five years was felt to provide a reasonable balance between the developer and residents in terms of the financial impact.

Promotion and awareness-raising

The design of the site and provision of key facilities and services outlined above will make it feasible for residents to make more sustainable travel choices. But it is also essential that these options are effectively marketed and promoted to households in the development.

The marketing strategy adopted should involve some engagement with residents at an individual level. ‘Personalised travel planning’ techniques - in which individuals receive customised advice tailored to their journey needs - have proved successful in encouraging more sustainable travel patterns. A new development provides an opportunity to offer this kind of advice when residents have just moved in. At this time, new travel habits are being established and people may particularly welcome information about the services and facilities available to them.

Sales and induction

With special training for sales staff, residents can be made aware of the travel arrangements and the access options serving the site from the outset, as part of the normal sales and marketing process for the new development. Good access by public transport, attractive walking and cycling facilities and measures to reduce the adverse effects of traffic are all positive features to be highlighted to potential residents, for example in sales literature.

In addition, it is important that potential residents are made aware of the transport characteristics of the development from the outset to ensure that misunderstandings do not arise later. For example, informing residents of the layout of bus routes which pass through the site and parking restrictions early on in the process should help guard against these issues becoming a controversial subject once people move onto the site.

Good practice - marketing

In the Queen Elizabeth Park development in Guildford, Surrey, the ‘green transport’ credentials of the scheme were included from the outset in the marketing of properties to potential residents. The sales staff were briefed by the developers’ consultants who had prepared the travel plan and the travel benefits were sold as a positive extra for new residents.

In some travel plans, each newly occupied home receives an induction visit, at which the site travel coordinator makes contact, takes the householders through the travel opportunities of the site, explains about the travel plan and its incentives, and offers detailed travel advice about the journeys they want to make and facilities they want to reach.
Welcome packs

Many of the travel plans in the study used developer funding to provide substantial financial incentives for sustainable travel as part of a residents’ welcome pack. Such incentives are likely to play a critical role in influencing travel habits. For each household, the welcome pack might include:

- Free/discounted use of public transport - e.g. a voucher to provide free bus travel for a year for a number of people within each household;
- Free/discounted use of the car club - e.g. a voucher to provide free membership for up to two adults per household for the first year;
- A free/discounted bicycle or bicycle equipment - e.g. a voucher to provide this for a number of people within each household;
- An offer of a visit from a personal travel adviser who can help provide information about sustainable travel that is specifically geared to the journey needs of the household;
- An offer of locally based on-road cycle training;
- Walking and cycling maps showing local walking and cycling routes in relation local facilities such as sports centres, cinemas, pubs, health centres, shopping and routes out into nearby countryside;
- Site specific public transport information - explaining what buses serve the site and what services can be taken to access specific facilities. In co-operation with local leisure providers it may be possible to provide special admission vouchers giving discounts for people accessing these facilities by sustainable transport;
- Information about the travel plan and any other services provided to support sustainable travel, such as home shopping delivery, local taxi service, tele-centre facility etc.
- Feedback survey to gather early information about perceived transport choices, the impact of the travel plan and ways of improving the travel plan.

Research shows that simply providing promotional literature is not as effective as engaging with people on an individual basis and encouraging them to actively select the information they need. This suggests that it is best to assemble the contents of each welcome pack in consultation with the individual household, possibly as part of the induction session, rather than simply issuing a pre-made pack.

Good practice - designing an induction package

Residents at Poole Quarter in Poole, Dorset, will be able to choose between free car-club membership or substantial discounts on public transport or cycle purchase - worth up to Â£100 for each household. The travel plan allows for the discount voucher to be offered to up to three successive occupiers in each home, including the initial owner or tenant.

Sales staff for the development will be trained in personalised travel planning so that they can provide travel advice to new occupiers as part of the normal induction process for residents. Marketing literature for the site will emphasise the sustainable nature of the development in terms of location and travel choice, and a travel plan notice-board outside the sales office will be regularly updated.

A residents’ travel pack will provide a menu of the "travel tasters" on offer as part of the travel plan, together with a form to apply for them. The pack will also contain lots of information about travel related services and facilities, together with user-friendly bus and rail timetables, pedestrian...
and cycle route maps and contact details of the travel coordinator.

The cost of all these measures will be met by the developer - Crest Nicholson - as part of their integrated transport package.

Ongoing promotion

In addition to the induction process, other initiatives will be needed to promote sustainable travel on an ongoing basis. These might include, for example:

- A regularly updated community website, providing comprehensive travel information of the type included in the welcome pack, with details of forthcoming travel events and forums, timetable changes and new promotional offers. The website may also include a community car-share database and links to home delivery shopping services.
- A community notice board for travel information - again regularly updated.
- Community travel forums - at which residents are invited to give feedback to the travel coordinator and service providers about travel arrangements.
- Community travel events - for example cycle promotion days, special launches for new services.
- Establishment of a Bicycle User Group for the site together with a ‘cycle buddy scheme’ so that experienced cyclists can help less experienced ones get started.
- Regular follow up meetings with individual households to review the success of travel arrangements.

Good practice - travel vouchers cut car use

At Beaulieu Park in Chelmsford, residents moving into a new phase of the development were given a year’s free bus travel for two people in each household, together with integrated bus and rail information. Residents from the existing development were also given three months free travel for every household, and a discount on their renewed season tickets. In addition, the developer, Countryside Properties, funded extra morning and evening runs for a bus between Beaulieu Park, the town centre and Chelmsford railway station, and new bus stops were installed on site.

The package has proved successful: the bus service, which was initially guaranteed by the developer for five years, became commercially viable in two and a half. Mayer Brown, the consultant implementing these measures for the developer, is setting up a community travel web site, funded with sponsorship from local companies.

Destination travel plans

Unlike school, workplace and visitor travel plans, residential travel plans cover all journey purposes and are implemented at the origin of these journeys rather than the destination. In addition, account needs to be taken of the type, location and scale of residential development. In some cases though, the residential travel plan will be for a mixed use development that includes workplaces, schools and leisure centres. As a result, the travel plan for the whole development may incorporate or provide a framework for ‘subsidiary travel plans’ for these centres, for example, the occupants of a new office block may be required to draw up and implement a workplace travel plan for the building.
A residential travel plan can also include measures that are intended to support the travel plans of schools, workplaces and leisure sites that serve the development, though they are not part of the site. For example, the developer could be required to provide highways safety improvements to create a safe route from the development to a nearby school or encourage residents on the development to start a walking bus.

A developer contribution could also be used to pay for local authority officer time in working with a local school or workplace serving the development to assist them in implementing a travel plan if agreed as part of the section 106 agreement.

On a large mixed use development the residential travel plan can provide an over-arching framework by which subsidiary travel plans are to be introduced and implemented, by other parties, where appropriate.

**Good practice - A travel plan framework**

A Travel Plan Framework has been agreed as part of the outline planning consent for New England Quarter in Brighton, a £150m regeneration project close to the station. The area will become an urban neighbourhood incorporating a mix of uses, including a supermarket, two hotels, residential accommodation, and a language school with student accommodation. The resident population is expected to reach 1,000 and there should be employment opportunities for the same number of people.

The travel plan framework will ensure that in future individual travel plans are developed for each development block, reflecting their different uses and access needs. The framework sets out the aims and objectives and key actions for travel plans on the site. All stakeholders are required to identify travel plan coordinators for individual blocks, located within a site building and supported by a representative of senior management within the organisation. A travel plan framework manager will oversee this process.

**Good Practice - supporting off-site school travel work**

At Poole Quarter in Poole, Dorset, the developer has been required, through the section 106 agreement, to contribute to off-site highways engineering improvements that will provide a safer route to a nearby school.

At the neighbouring development of Seldown, cycling and walking are facilitated by the home zone design, and the residents’ association will be encouraged to help with a walking bus and a ’cycle train’ (a group of children cycling with adult escorts) for the school journey.

Detailed guidance on the development of school, workplace and visitor travel plans is also available in other publications.  

**Delivering the travel plan**

However good the measures in the travel plan are, their success will depend on their effective delivery. Robust arrangements for the implementation and running of the travel plan need to be included in the plan itself, and secured from the developer through the section 106 agreement. Again these will vary depending on the type, scale and location of the development. They include:
• Resources for the implementation and day to day management of travel plan measures, together with appropriate management structures;
• Detailed time frames for delivery and handover arrangements for the travel plan or its components (when the developer’s responsibility ceases);
• Targets and monitoring arrangements;
• Ongoing support from the local authority and provision for enforcement in the event of non-delivery.

These issues are discussed in Chapter 4 on management, monitoring and enforcement. Chapter 3 outlines the broad subjects that need to be covered in the section 106 agreement, including some of the mechanisms used to ensure effective delivery.

20 National Travel Survey for 2002/03, Department for Transport

21 Funding City Car Clubs through S.106 Agreements à Guidance for Officers. CityCarClub briefing, updated April 2005.

22 Transport contributes around 27% of total UK carbon dioxide emissions. The UK is committed to a 20% reduction in greenhouse gas emissions by 2010 and to putting ourselves on a path to cut emissions by some 60% by 2050, as recommended by the Royal Commission on Environmental Pollution, with real progress by 2020.


3. The process of requiring a residential travel plan

Local authorities and developers are increasingly familiar with the requirement for travel plans as part of the planning approval process. Advice such as Using the Planning Process to Secure Travel Plans (Department for Transport, 2002) has clarified the role of travel plans in new development and they are a commonplace requirement for many new business, education, health and retail developments.

The requirement of travel plans for residential development is also gaining pace as their benefits in helping to reduce the transport impacts of new housing are recognised. The process of developing such plans is similar to that for other travel plans.

This chapter provides an overview of the stages involved in this process; from identifying the need for a residential travel plan, to final agreement of the plan as part of the planning consent. These stages are illustrated in Diagram 2.

Pre-application discussions

Local authorities can help facilitate the development of effective travel plans by ensuring that policies in support of travel plans are incorporated in local planning policies including the Local Development Framework (LDF) and LTPs and clarified through supplementary planning advice (see Chapter 5, Strategic Framework). These measures should highlight the importance of travel planning to developers.
from the outset and be defendable, if necessary on appeal, if part of the LDF process. They should not be seen as an optional extra but as a fundamental part of the development control process.

Whether or not local authorities have such policies in place, it is important in the case of major residential development that pre-application discussions take place. Authorities face increasingly tight deadlines to approve planning applications and it is ever more important that discussions take place early and action is agreed as far as possible **before** planning applications are submitted, either directly with the potential applicant or through a planning brief. In relation to the transport considerations, these discussions should cover:

- The requirement for a transport assessment and its scope;
- Scope for the layout, mix of uses and design to minimise the need for car travel and maximise accessibility for future residents;
- Other relevant policies and guidance and whether there is any conflict;
- Consideration of specific transport works required as a result of the development;
- The need for a travel plan arising from the transport assessment;
- The scope of the travel plan and its components, including likely targets;
- The need for involving other parties e.g. legal, transport operators.

**Diagram 2: Residential Travel Plans and the Planning Process**
Pre-application discussions present an important opportunity for local authorities and potential applicants to identify any specific concerns with the development at an early stage, thereby allowing time for developers to respond before the details of the planning applications are finalised. In terms of transport considerations, this could allow developers time to amend the design of the development. Examples...
include reducing parking requirements, increasing permeability and including cycle provision, as well as considering further measures to be brought forward through the travel plan.

**The transport assessment**

The need for a transport assessment is outlined in *Planning Policy Guidance 13: Transport* (Department for Transport/Office of the Deputy Prime Minister, 2001). The guidance advises that transport assessments should be prepared and submitted alongside planning applications for development and states that:

"the coverage and detail of the Transport Assessment should reflect the scale of development and the extent of the transport implications of the proposal. For small schemes, the Transport Assessment should simply outline the transport aspects of the application. For major proposals, the assessment should illustrate accessibility to the site by all modes and the likely modal split of journeys to and from the site. It should also give details of proposed measures to improve access by public transport, walking and cycling, to reduce the need for parking associated with the proposal and to mitigate transport impacts. Where appropriate, a travel plan should be included."  

The guidance therefore makes it clear that the transport assessment should reflect the scale of the development in the level of detail considered. Nevertheless, in all cases it is anticipated that a transport assessment will be undertaken. In addition, the guidance emphasises that a travel plan can be a key tool in resolving the transport issues highlighted by the transport assessment. The travel plan should include both the physical and management measures necessary to address the transport impacts arising from the new development, as it will become a key management tool integrating all the different elements. It should be developed as the last part of the transport assessment process but is separate from it. Once planning permission has been granted, the travel plan will provide the ongoing management tool for implementing the necessary transport measures to the site.

**Good practice - travel plan within the transport assessment**

*When Laing and Linden Homes proposed the Queen Elizabeth Park development of 525 new homes and other facilities on the old Guildford Barracks site in Surrey, they prepared a transport assessment for the site. A travel plan was included as an integral part of the transport assessment. This was prepared by a consultant on behalf of the developer, in close association with a local authority officer from Surrey County Council. The plan clearly sets out the proposed improvements to walking, cycling, and public transport routes as well as other initiatives aimed at changing travel behaviour.*

In reality, considerations of the transport assessment and the resulting travel plan are likely to fall to different local authority officers. In this case, liaison between officers will be important to ensure a consistent view within the local authority and in dialogue with developers.
Requiring a residential travel plan

One outcome of the pre-application discussions should be to identify the need for a transport assessment and a travel plan. Some local authorities have identified indicative thresholds for requiring travel plans and these may be helpful as long as they are not too rigid.

The problem experienced with fixed thresholds when they have been introduced in other areas of planning policy (e.g. the provision of affordable housing) is that developers sometimes limit the size of individual applications by using the threshold as the upper limit. This can result in multiple ’at limit’ applications, which cumulatively have the same effect as one major application but avoid the requirements imposed by exceeding the threshold. As such, it is likely to be more helpful to identify the characteristics of the development that would trigger the need for a travel plan (see example of Ealing below). In this way, the criteria selected can reflect the different geography and transport characteristics of the area.

Good practice - criteria for requiring a Transport Assessment

Ealing Borough Council has prepared supplementary planning guidance (SPG20) on Transport Assessments. Rather than specifying exact thresholds for the requirement of a Transport Assessment, the guidance sets out indicative criteria. For example, it states that:

’In general, a TA will normally be required when any development site exceeds one or more of the following trip generation criteria:
  a) More than 500 person trips per day
  b) More than 500 vehicle movements per day
  c) More than 100 person trips during the peak hour (07.00 - 10.00 and/or 16.00 - 19.00)
  d) More than 50 vehicle movements in any single hour
  e) More than 20 heavy goods vehicles (over 7.5 tonnes) per day
  f) Any goods vehicle movement between midnight and 6am
  g) Twenty or more car parking spaces are proposed, or where there is less car-parking provision than the restraint based Unitary Development Plan parking standards.’

The use of indicative criteria can also be useful in identifying when travel plans may be required in new development.

The purpose of requiring a travel plan should be to deliver the functions outlined earlier, and to help reduce unnecessary car trips from new development where possible. Good travel plans can ensure that residential developments in accessible sites work well - hopefully exceeding original expectations for the use of sustainable transport modes and mitigating community or engineering concerns about traffic congestion. They can overcome transport objections to residential development in many instances when it can be demonstrated that sustainable accessibility to the development can be delivered and this is achieved through a section 106 agreement. Travel plans cannot, however, be expected to make a site which is wholly unsustainable in principle in planning and transport terms into a sustainable one, and should not be used as a justification for approving such schemes.
Good practice - location must be acceptable

Surrey County Council highway engineers recommended refusal of an application for residential development in Tandridge, Surrey, on grounds of poor transport links. This was in spite of a travel plan which included an impressive package of measures to support alternative travel. In the view of the planning engineer commenting on the proposal, ‘single non-car initiatives, or even a full travel plan, do not make an unsustainable location acceptable’.

No two developments are the same and it is important that the type of travel plan required by local authorities of developers is appropriate for the development in question, including its size, context and mix of uses. A spectrum of different residential travel plans can be seen in practice, reflecting local variations. Possible approaches for developments involving residential uses include:

- **At the lower end of the scale**: a package of relevant measures including ‘smarter choices’;
- **Medium-sized residential or multiple use developments**: detailed all-embracing residential travel plan addressing issues and objectives for all uses;
- **Large/complex mixed use development**: Framework Travel Plan (possibly with some overarching and essential measures) which underpins the preparation and implementation of subsequent travel plans for each sub-area.

What should be in a residential travel plan at this stage?

As part of the early discussions between local authorities and developers it is important to recognise the particular challenges of designing a travel plan for a new development. A key issue to overcome is that the travel needs of future inhabitants are largely unknown before they move into their new homes. This creates two requirements for residential travel plans which mean they should:

- Be recognised as evolutionary documents which will need review and refreshment over time as people move onto the site. The review procedures should be built into the residential travel plan at the outset;
- Draw on analogous travel information from the local area (i.e. from similar nearby developments) through a bespoke travel survey, or from relevant databases (e.g. TRICS or in London TRAVL) to enable an informed estimate of likely future travel patterns to be made and to provide a baseline for the plan.

The previous chapter discusses the various components and measures of a residential travel plan in detail. Here we provide an overview of these components as a means of ensuring that they are agreed and dealt with early on in the planning discussions.
Checklist 2: RTP Components to be covered in the travel plan document

<table>
<thead>
<tr>
<th>Component</th>
<th>Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sets the context for the development and makes reference to local policies for housing and transport</td>
<td></td>
</tr>
<tr>
<td>Assesses the current transport situation at the site and surrounding area</td>
<td></td>
</tr>
<tr>
<td>Describes the accessibility of the site and the availability of services locally (such as schools, major employers, healthcare and shopping)</td>
<td></td>
</tr>
<tr>
<td>Analyses local travel behaviour to provide baseline data and an estimate of new demand resulting from the development</td>
<td></td>
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<tr>
<td>Sets objectives - reflecting the broader goals established in local and regional transport and land use policy</td>
<td></td>
</tr>
<tr>
<td>Establishes targets - these could include modal split targets, trip length, etc. as well as qualitative goals for travel behaviour</td>
<td></td>
</tr>
<tr>
<td>Includes appropriate measures - a package of measures including both demand restraint and positive incentives to use sustainable transport modes and, usually, the appointment of a travel plan co-ordinator</td>
<td></td>
</tr>
<tr>
<td>Outlines the management of the plan - to ensure it has longevity beyond the initial period of operation and handover arrangements from developer to residents are clear</td>
<td></td>
</tr>
<tr>
<td>Clarifies how performance will be measured - e.g. criteria for monitoring and a review programme</td>
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</table>

Developers will normally draw on specialised technical advice for the preparation of travel plans, which is often provided by consultants. It is important during the preparation of the plan that developers (or the developer’s consultants) liaise closely with the local authority transport officers as well as the planning officers. This should ensure that the plan reflects the policies established in the LTP and LDF and takes account of other travel plans operational in the area.

In turn, local authority travel plan officers should facilitate consultation on different aspects of the travel plan as appropriate with other local authority officers, such as public transport co-ordinators, cycling and walking officers. Other officers and other agencies are likely to be involved to address issues of accessibility, feasibility/effectiveness of measures (e.g. improved public transport services) and local planning concerns. Again, the authority officers can facilitate these discussions.


Consultation

As part of the normal process of developing major sites, developers and local authorities will consult with the local community (i.e. residents on neighbouring developments). Ideally this should take place at the initiation of the project and continue throughout the development and refinement of the plans. Among other issues, this will provide an opportunity for identifying specific concerns about transport or traffic. It
can also provide the chance for discussion of new transport measures which may form part of the travel plan such as improved bus services, walking and cycling facilities and car club provision - all of which could potentially benefit the existing local community, as well as new residents.

Good practice - consultation with the local community

Following the Department of Health’s sale of the High Royds hospital site in Leeds for development, public meetings and workshops were organised by Leeds City Council to consult on the proposals. These were funded by the developer and jointly run by both parties.

Local residents were positive about the development, welcoming the extra amenity and the decision to retain existing buildings. However, there was concern from all sides about the level of traffic likely to be generated. To thrash out these issues, a full-day workshop was held to investigate what could be done. As a result of the issues raised in this session, a range of detailed transport measures were proposed for the site.

Evaluation

Developers and local authorities should ensure that the final travel plan is specific to the particular site; that it includes appropriate measures to respond to the issues raised in the transport assessment; and is realistic. The importance of particular measures to the travel plan should be clear from the outcomes of the transport assessment which should be used to establish priorities. The benefits of residential travel plans will only be felt if they actually deliver the objectives set out in individual plans and have the overall effect of helping to promote more sustainable travel choices. Travel plans should demonstrate how the individual measures proposed will be delivered and at what stages. Ideally, measures should be phased in at the earliest possible stage to be effective, while accepting that the plan will also need to evolve over time.

DfT has provided guidance on the key factors for the success of workplace travel plans and advice on assessing travel plans ahead of implementation. While residential travel plans can be expected to follow broadly similar principles, a detailed evaluation tool does not exist.

The following table summarises the key elements to look for in residential travel plans:
Checklist 3: TRACES evaluation of travel plan process

<table>
<thead>
<tr>
<th>T</th>
<th>Transparent</th>
<th>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</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td>Realistic</td>
<td>Plans should set realistic but stretching targets, which reflect Local Development Framework and Local Transport Plan policies and the likely make-up of new 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).</td>
</tr>
<tr>
<td>A</td>
<td>Achievable</td>
<td>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.</td>
</tr>
<tr>
<td>C</td>
<td>Committed</td>
<td>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.</td>
</tr>
<tr>
<td>E</td>
<td>Enforceable</td>
<td>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.</td>
</tr>
<tr>
<td>S</td>
<td>Sustainable</td>
<td>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 residents or other organisations and continuing sources of funding for the plan.</td>
</tr>
</tbody>
</table>

At application stage, residential travel plans can be evaluated in terms of whether they:

- Include a broad range of measures to be considered as relevant, see Checklist 1: Measures/ issues to be considered for residential travel plans;
- Include all key travel plan components on Checklist 2: RTP Components to be covered in the travel plan document;
- Meet the TRACES evaluation criteria on Checklist 3, above;
- Follow the guiding principles for residential travel plans set out in Chapter 1.


27 The TRACES checklist has been developed from evaluation work initiated by Surrey County Council.
Securing the travel plan through planning consent

The travel plans reviewed for this report were all secured through section 106 agreements, though some components (e.g. cycle parking) were the subject of conditions. The nature of the agreements varied considerably as did the nature of the travel plan and when travel plans were required to be prepared. Approaches included:

- A package of transport measures aimed at promoting sustainable transport choice and secured as a series of individual obligations through the S106 but not included within a formal travel plan document (e.g. High Royds site, Leeds);
- A requirement to produce a framework travel plan before development commences, and then to produce individual travel plans for specific blocks within six months of occupation (e.g. New England Quarter site, Brighton);
- A partial travel plan framework and detailed schedules in respect of key elements of the travel plan framework, together with a requirement for a full travel plan at a specified time (e.g. Grand Union Village, West London);
- The full travel plan developed as part of the planning application and included as part of the section 106 agreement (e.g. Queen Elizabeth Park, Surrey);
- A combination of the approaches above including an obligation in the S106 not to commence development until a travel plan was submitted and approved alongside specific essential travel plan obligations (e.g. Poole Quarter, Poole, Dorset).

The local authority can control the content of the travel plan and ensure its implementation most effectively by requiring the plan at the time of the planning consent and prior to commencement. There may be circumstances where this is not realistic (e.g. as seen in Brighton with the development of the New England Quarter) but it should be an aim wherever possible.

In this way, the targets and measures can be compared with the issues raised in the transport assessment and any necessary adjustments required before planning consent is given, unless the application is rejected as failing to provide for an acceptable level of sustainable access. It also allows for the site layout and design to take full account of all travel needs initially rather than trying to "retrofit". This approach means that many travel plan measures can be designed in from the outset, rather than these design features incurring an additional cost.

A further benefit of this approach is that it should ensure that measures proposed in the travel plan (such as transport information and public transport vouchers) are available from the moment people move into their new homes. This is likely to have a greater impact on initial transport behaviour than the subsequent introduction of measures six months later when people have established travel patterns.

Section 106 agreements

Whatever the broad approach, it is likely that a section 106 agreement will be necessary in order to secure the capital and/or revenue financial commitments, and to link these commitments with the occupation of the development. Where a section 106 is utilised, it needs to specify the timescales associated with the overall travel plan and its components and implementation. In addition, it will need to explicitly secure those elements that relate to financial obligations and related timescales/triggers (e.g. occupation of x units), future management and funding, and performance measures and any remedial action (see Checklist...
Mechanisms within the agreement should also provide for further development, review and updating of the travel plan in the light of experience once sites are occupied and over an agreed period of time following completion.

From a legal viewpoint there is likely to be a need for the inclusion of negatively worded clauses and financial sanctions (see Chapter 10 of *Using the planning process to secure travel plans - Best Practice Guide*, Department for Transport July 2002). There is also the option of requiring bonds or up-front payments against the performance of the travel plan and/or elements of it.

With the revised *Circular 1/97 on Planning Obligations* (Circular 05/2005) some aspects of the section 106 mechanism have been clarified, such as scope to include maintenance payments, to include a requirement to make contributions towards pooled financing of a larger scheme, and a stronger emphasis on national, regional and LDF core policies. This may create new opportunities in terms of securing funding for travel plan measures. In particular, it could enable local authorities to establish 'travel plan funds', whereby developers of smaller schemes with travel plans could contribute to a local authority-held fund for implementing measures necessary for the wider success of travel plans.
Checklist 4: Section 106 planning agreement content

<table>
<thead>
<tr>
<th>Checklist Item</th>
<th>Yes/No</th>
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<tbody>
<tr>
<td>Includes the travel plan within the agreement as a holistic document</td>
<td></td>
</tr>
<tr>
<td>Sets out a timetable for the preparation, implementation, monitoring and review of all stages of the travel plan</td>
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<tr>
<td>Sets out the triggers and payment schedule for all financial obligations, both capital and revenue</td>
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<tr>
<td>Spells out the process and funding for the first 3-5 years of the development, including implementation, management and monitoring of the travel plan</td>
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<tr>
<td>Clarifies the arrangements for ensuring sustainability of the travel plan into the longer term future (when developer may not be involved), including who will fund/employ any travel coordinator, operation of transport facilities, car clubs etc.</td>
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</tr>
<tr>
<td>Clarifies how future occupiers of the development will be involved and whether any costs will fall to them in relation to implementation/management of the travel plan</td>
<td></td>
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<tr>
<td>Specifies how any profits from travel plan operations will be managed and related accountability</td>
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<tr>
<td>Outlines parking controls and management</td>
<td></td>
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<tr>
<td>Ties in third parties where appropriate (they can be signatories)</td>
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<tr>
<td>Clarifies the involvement of the local authority</td>
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</tr>
<tr>
<td>Identifies, where appropriate, any contributions to larger schemes</td>
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</tr>
<tr>
<td>Sets out targets for the performance of the travel plan and what will happen if the targets are not met, including any other amelioration measures or sanctions</td>
<td></td>
</tr>
<tr>
<td>Sets out the monitoring and review programme and criteria, and who is responsible for funding, undertaking and reporting</td>
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</tr>
<tr>
<td>Specifies who will take any action to revise the travel plan following the review(s)</td>
<td></td>
</tr>
<tr>
<td>Where appropriate, sets out mechanisms for enforcement</td>
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**Specific mechanisms for ensuring delivery**

Case studies reviewed in this study showed that use had been made of a number of helpful mechanisms to strengthen section 106 agreements and ensure that key measures within the travel plan will be delivered. Examples involved:

- Providing incentives for making components of the travel plan succeed;
- Introducing contingency arrangements that will come into force if a component does not perform as expected;
Clarifying responsibilities and future liabilities and promoting coordination;
Clarifying the role and responsibilities of the local authority and any third parties (e.g. transport operators).

**Incentives**

The developer can be asked to provide a time-limited subsidy for a service that ideally will later become self financing. For example, a bus service which may eventually attract enough passengers not to need further subsidy; a community web site that may be able to attract sponsorship from local firms; a car club that may in time become a self-sustaining business. Under some section 106 agreements, if this happens sooner than expected (and before the developer’s responsibilities for the site are at an end) the subsidy paid by the developer will be reduced accordingly. This has the advantage that the developer has an inbuilt incentive to ensure that the initiative is successful as quickly as possible. Alternatively, the agreement can ensure that if the subsidy is no longer required for the original purpose it will be diverted to pay for other initiatives in the travel plan. The advantage here is that the financial contribution is retained to support sustainable travel.

**Contingency arrangements**

Within both the plan and the section 106 it may be useful to spell out a contingency arrangement in the event that a measure cannot be implemented, whatever the reason. The alternatives could be outlined in the plan and the section 106, or alternatively flexibility in the use of financial contributions could be incorporated. For example, if it was difficult to find an operator for a car club scheme, then the contributions provided to initiate the scheme could be used for another measure that would help reduce the number of car journeys. Contingency arrangements may also be made to ensure that specific problems can be addressed if and when they arise - for example, an arrangement that if there are problems with overspill parking in a neighbouring area the developer will fund implementation of a controlled parking zone to deal with this.

**Responsibilities and future liabilities**

Many section 106 agreements include schedules that spell out contributions or actions, and triggers for such contributions/actions in relation to progress in the construction and occupation of the site. Other triggers might be considered, such as the stage reached on particular travel plan measures, take up of services or meeting of targets. Where there are ongoing and future costs that cannot be calculated or will fall to future occupiers, it is important to set out a methodology for calculating such costs and how they will be apportioned and collected (e.g. a bond; a maintenance fund).

**Local authority and third party input**

Funding may be secured from the developer to enable the authority to play a role in the implementation and/or management of the travel plan, such as for its monitoring or future review, advice on the plan in future, and towards a local authority employed travel plan adviser. Where delivery of the travel plan depends on consultants or on third parties such as public transport and other operators, it is more effective to spell out these roles, how they will be funded, and what will happen if they are not able to play that role - rather than leave these to ‘best endeavours’.
4. Management, monitoring and enforcement

Management

A key lesson from workplace and school travel plans is the importance of establishing a clear structure for the ongoing management of the plan and - in the case of speculative travel plans - arrangements for the handover of the plan to occupiers of the site or another relevant body. Residential travel plans share these requirements. Ultimately, these arrangements should ensure the achievement of the objectives and targets established in the original plan. The following elements are viewed as central to the successful management of plans:

- The travel plan coordinator role;
- Mechanisms for management at different stages of the travel plan;
- Management structures: steering groups, management companies, community trusts and other options;
- Long term sustainability.

These are discussed further below.

The travel plan coordinator role

Most successful plans have a travel plan coordinator who is responsible for implementing the individual measures in the plan. The travel plan coordinator should act as the promoter of the components of the travel plan to secure its implementation, as well as being the key contact point for residents and other people who use the site - for example, with employees working at on-site businesses. This role is normally undertaken by a person appointed and funded by the developer as a key element in the delivery of the travel plan but it can be undertaken by someone in conjunction with other responsibilities, a consultant or in some instances, the local authority. The most appropriate approach will depend on the type, scale and location of the development.

It is important that the person with the travel plan coordinator functions is either located on site, where it is a large site, or makes regular visits to the site. In this way they can become a familiar face with residents as someone who is known to 'champion' the sustainable transport measures of the development. As such, the person undertaking travel plan coordinator functions should have a well defined role, with dedicated staff time commensurate with the tasks required by the travel plan. Depending on the nature of the travel plan and site, this may be a full-time role, or a role that can be accommodated alongside other duties on or off the site. In some cases it will be a part time role fulfilled on behalf of the developer by an external consultant. In all cases, it is helpful if the coordinator has a clear link to a senior management representative and is ensured of their support.

Duties of the travel plan coordinator

The travel plan coordinator will play an important role in new residential development which will vary at the different stages and depending on the size and nature of the site. Their duties typically include:
Leading on the delivery of the travel plan once approved or, if appointed earlier, inputting to its formation;

Representing the 'human face' of the travel plan - explaining its purpose and the opportunities on offer. The coordinator will also play a central role in liaison with residents’ steering groups or management committees;

Providing personalised travel planning tailored to residents’ needs (or procuring this service from others);

Promoting the individual measures in the travel plan (e.g. a car club);

Liaising with public transport operators - it is helpful if coordinators initiate contact early on to enable bus and train operators to brief them about services and fares. At a later point, the coordinator can also feed back residents’ opinions to the operators;

Ensuring the approved travel plan and its component parts are being actioned;

Monitoring the travel plan implementation;

Taking a key role in review of the travel plan.

Good practice - travel plan coordinator

The section 106 agreement for the New England Quarter site development in Brighton specifically requires the provision of a Travel Plan Framework Coordinator prior to the commencement of development and the subsequent development of individual travel plans for each block. It states that: ’Travel plans shall provide for the employment of a travel coordinator whose responsibilities shall include:

- managing and monitoring travel plans;

- coordinating all of the various travel plans;

- reviewing the travel plans and setting new targets if necessary’

In the Travel Plan Framework for the site it further specifies that: ’Travel Plan Coordinators will be located within a building on the development and will need to be supported by a representative of Senior Management of the Organisation’.

Duration of travel plan coordinator role

The duration of the travel plan coordinator role, and the general responsibilities of the post, should be agreed between the developer and the local authority from the outset. These aspects can be detailed in the original travel plan and agreed as part of the section 106 agreement.

In specifying the duration for the travel plan coordinator function, it is important to bear in mind the role this post should play in helping deliver the travel plan’s objectives and targets. As such, it should be agreed that the monitoring work overseen by the coordinator is used to amend and update the plan in light of the monitoring findings. Again provision can be made in the section 106 agreement to extend the role of the travel plan coordinator in situations where travel plans are failing to achieve the objectives and targets established in them until such time as adequate improvement has been achieved.
Current experience suggests that the role of travel coordinator is often provided by the consultants employed in preparing the travel plan on behalf of the developer, especially during the early stages. Several of the travel plans reviewed for this research had travel plan coordinators appointed to cover the entire period of the construction of the site through to habitation and beyond, i.e. for a total of 5-6 years. This approach:

- Enables continuity in the development of the travel plan;
- Provides the staff resources necessary to develop travel plan measures in advance of occupation;
- Ensures that the coordinator can be on hand to brief development sales staff, and to contact residents as soon as they take up occupation.

### Management of the residential travel plan

The responsibility for preparing and implementing the travel plan normally rests with the developer. In practice, this has often meant that consultants are appointed to develop and take the plan forward. In some cases the plan is implemented in consultation with a steering group which has representation from different agencies involved in the plan, including the local authority, public transport operators and residents (once they are in occupation).

The travel plans reviewed during the research for this report highlight two important stages in the management of the travel plan:

**Stage one** - the early period of travel plan development and implementation covering the construction period, initial occupation of the site, and the first monitoring and review periods of the plan. This period is crucial in terms of ensuring that the measures outlined in the plan are actively implemented to help reduce car use by residents, and that the objectives and targets identified in the plan are being met. During this period, it is likely that the developer, management organisation and the person with responsibility for the travel plan coordinator function will all need to be closely involved in the management and refinement of the plan.

**Stage two** - once the development is fully occupied and integrated with the surrounding area, the responsibility for managing and developing the travel plan will normally need to be passed on. How this is achieved will depend on the type and scale of the development. Measures need to be put in place to ensure that the progress that has been achieved in developing the plan is maintained in the longer term. Where there is a management company already in existence to oversee other aspects of site management (e.g. landscape maintenance) it is likely to be most effective to transfer ongoing responsibility for the travel plan to the management company. The management company can then liaise with residents (e.g. through a Transport Working Group) and administer the travel plan on their behalf. Otherwise a formal body needs to be identified or set up, such as a Community Trust, where the scheme is large enough to sustain this approach.

Ultimately, the local authority will have overarching responsibility for the area as it is embraced by policies and measures established in the LTP. The authority can help identify an effective future management arrangement and also help to ensure coordination with other travel plan initiatives in the area, or take the plan forward themselves in cooperation with the local community.
Management structures

At both stages the management structures should involve the local residents. Where there is a travel plan coordinator they should play a key role in liaising between these management structures, the developer and local residents. A wide variety of mechanisms for managing the travel plan can be found in operation, as outlined in table 1.

<table>
<thead>
<tr>
<th>Table 1: Examples of travel plan management structures</th>
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<tbody>
<tr>
<td><strong>Steering groups:</strong> As part of Crest Nicholson’s development in Poole a steering group is being established to manage the travel plan. This will include the developer; the managing agent; the housing associations; the consultant; the local authority travel plan coordinator; and other officers as needed (e.g. cycling, public transport, school travel plans); bus and train operators; as well as developers from a neighbouring site (Western Challenge).</td>
</tr>
<tr>
<td><strong>Community trusts:</strong> The Grand Union Village in West London includes the establishment of a new community trust, with a dedicated transport working group to oversee the travel plan. The membership, terms of reference, and key areas of responsibility for this group are all detailed in the travel plan.</td>
</tr>
<tr>
<td><strong>Management companies:</strong> The High Royds development in Leeds includes the establishment of a management company (which has general responsibility for the maintenance of communal areas and enforcement of obligations) to take on responsibility of the travel plan in future.</td>
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</table>

The ultimate choice of management structure will depend on the nature and scale of the development, the mix of housing tenure, the developer’s preferences and the stage of the development. Nevertheless, whatever management structure is identified to take forward the travel plan, good practice would suggest that it should ensure the following:

- **There is a clear purpose, accountability and ability to take action.** This can be assisted by developing a constitution which requires the group where this can be established to help implement the plan and clarifies accountability. In addition, specific covenants can be required of residents by the developer in some developments which act in support of the plan (i.e., not to exceed the agreed parking limit or to create new parking spaces), and which the management group where established can help to enforce.
- **Provision of funding** to ensure ongoing administrative support for any group established and adequate resources to carry out necessary activities. The developer will normally pay for this activity in the first instance. Ongoing funding can be secured either through a one-off payment by the developer at the outset as part of the section 106 requirements which are then invested to provide an income, or through a contribution from service management charges paid for by residents in some developments (see example of Caterham Barracks below).
- **The developer remains responsible for delivering the travel plan through its initial implementation.** Steering groups and other management structures can assist in implementing the travel plan, but there needs to continue to be a clear line of responsibility to the developer for achieving the targets and objectives established in the travel plan. The plan should specify clearly at what point the developer can pass responsibility for the plan on to residents or the management committee or take no further action. This point of handover is likely to be related to the achievement
of key targets identified in the plan. Where targets are not achieved there can be a delay in handover of responsibility for the plan.

**Good practice - use of service management charges to fund plan measures**

At Caterham Barracks in Surrey, the service management charges paid by residents include a contribution towards the costs of maintaining a bus service to the site. Further funding to support the service is provided by the developer, Linden Homes. The service is reportedly popular and successful with over 315 passengers/week.

Residents were informed about the charge from the outset and are apparently keen to use the service, knowing that they have already paid something towards it. In addition, residents also contribute funding to a Community Trust for the development.

The arrangements for the management of the travel plan should be specified from the outset as part of the plan and formally agreed (for example, through the section 106 agreement). In addition, these arrangements should explain how progress in implementing the travel plan will be maintained in the longer term, beyond the period for which the developer may remain responsible for the development. It will be important that the discussions on these issues are undertaken in a spirit of partnership to secure the most appropriate solution for all parties. This is discussed further below.

**Good practice - long term management of the travel plan**

The travel plan for the Grand Union Village in West London specifies the arrangements for handing over the travel plan to the local community in future. It states that:

* Initially the development of the travel plan will be managed and overseen by the developer through the travel plan co-ordinator (up to six years);

* A Grand Union Village Community Trust will be established comprising local councillors and residents, the local housing association, the developer, the neighbouring community trust and a local education representative. Core funding is provided by the developer as specified in the section 106 agreement;

* Once the Community Trust is sufficiently established and has taken ‘ownership’ of the travel plan, it may take over the oversight and implementation of the travel plan. This could take place up to six years after the travel plan is originally approved;

* The Community Trust is recommended to set up a Transport Working Group to oversee the travel plan. Draft terms of reference for this group and a suggested membership list are included in the travel plan, though its formation will depend on the views of the trust in the future.

Clarifying such handover arrangements from the outset is a good defence against apathy or bad management resulting in the failure of the residential travel plan in future.
Sustainability of the plan

Ensuring the effectiveness of residential travel plans in the longer term requires a range of different factors. Depending on the site, its scale and nature, the approach will be different. First - as outlined above - it is important that an effective management structure is put in place to enable the overarching responsibility for the plan to be passed from the developer to the residents or to a residents’ management company or to another body which may be the local authority.

Second, provision can be made as part of the section 106 agreement to require that all future residents are informed of the existence of the travel plan and any restrictions it implies (for example, lack of access to parking permits in controlled zones). This role would initially be carried out by the developer in informing prospective residents. Once responsibility for the site has passed to private house owners, the information would be linked to the sale of individual properties (i.e., as part of the property search process normally carried out during house sales).

Third, there is a need to ensure the continuation of travel measures included in the plan into the future. These include car clubs, car share schemes, subsidisation /upgrades of public transport routes and other measures. While some of these measures are likely to reach commercial viability after an initial period of support it is important that provision is built into the travel plan at the outset for continuing support if necessary. For example, developers can be required to provide a covenanted sum as part of the planning negotiations which is then invested to provide the ongoing support for a public transport service, the transport coordinator function, or other activities for a specified period of time.

In addition to ensuring the ongoing availability of sustainable transport options on site, there are a number of other elements of the plan which will need to be maintained indefinitely. These include the provision of transport information and sustainable travel incentives for new residents, sound management of the parking resource, and maintaining the community website. While it is possible to require ‘up front’ financial provision (as part of the planning consent) for maintaining these services for a period of time, there are other funding options such as including these costs within service management charges paid by residents or cross-subsidising these costs from other income, e.g. visitors parking if charged for.

Ideally, the detail of the handover arrangements for the travel plan should be clarified in the original travel plan and as part of the initial negotiations on planning consent and any section 106 agreements. This should help to ensure the travel plan continues to influence travel behaviour in the future.

The following table summarises the various stages in the management of a typical travel plan for residential development. It also indicates the key sources of funding and measure used to secure funding/compliance at each stage. As with all other aspects of the guide a judgement will be required as to what is appropriate in the specific circumstances of the development.

<table>
<thead>
<tr>
<th>Table 2: The management of the residential travel plan</th>
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<tr>
<td>Phase</td>
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<table>
<thead>
<tr>
<th>Pre-construction</th>
<th>Travel plan prepared by developer (usually by consultant)</th>
<th>Agreed appointment of travel plan coordinator as part of the plan</th>
<th>planning consent, S106</th>
<th>Travel plan paid for by developer.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Construction</strong></td>
<td>Travel Plan coordinator in place 4-6mths before residents move in. Establishment of steering group including key agencies</td>
<td>Liaising with &amp; training sales staff about transport benefits of site Preparing marketing materials Ensuring TP measures are in place from the outset</td>
<td>Coordinator’s responsibilities outlined in the travel plan Implementation of identified measures</td>
<td>Travel Plan Coordinator paid for by the developer</td>
</tr>
<tr>
<td><strong>Early moving-in period</strong></td>
<td>Travel Plan coordinator in place Establishment of residents group e.g. site management committee or other structure</td>
<td>Publicity and launch of TP Provision of personalised travel marketing Promotion of individual plan measures Establish the management group for the plan and initiate meetings. Monitoring and amendment of plan</td>
<td>Plan measures detailed in the original Plan and agreed as part of S106 Management structure for Plan agreed as part of S106 Implementation of identified measures</td>
<td>Developer contributions towards individual plan measures.</td>
</tr>
</tbody>
</table>
Established community and into the future

<table>
<thead>
<tr>
<th>Established community and into the future</th>
<th>Formal management structure to take on responsibility for the plan</th>
<th>Plan coordinator facilitates transfer of responsibilities for the plan to residents’ group /Community Trust or other management structure e.g. management company.</th>
<th>Transfer of responsibilities outlined in original Plan.</th>
<th>Individual transport measures (e.g. car club) may reach commercial viability. Ongoing funding for other measures can be provided by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel plan coordinator may continue indefinitely or have a finite term (say 5 -6 years after occupation)</td>
<td>Monitoring of effectiveness by local authority based on regular review</td>
<td></td>
<td></td>
<td>Covenanted sums secured at time of planning consent.</td>
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<td></td>
<td></td>
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<td></td>
<td>Contributions by residents as part of broader service charges.</td>
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<td></td>
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<td></td>
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<td>Cross subsidies</td>
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</tbody>
</table>

Ultimately, once a development has become embedded in the area, it will be embraced by the local authority’s actions to manage transport and traffic.

**Monitoring and review process**

In contrast with travel plans for most existing developments, new residential travel plans have to be prepared in the absence of precise information on the travel behaviour of future residents. As such, they will need to draw on a range of analogous information to provide an informed basis for developing the plan. Sources of information can include bespoke travel surveys drawing on the trip rates from similar, nearby developments, as well as databases like TRICS (or in London TRAVL). Much of this information will be included in the site transport assessment.

It should be noted that the Association of Commuter Transport and TRICS are jointly preparing a methodology for monitoring the effectiveness of travel plans. For new sites, this recommends the use of data drawn from the Transport Assessment and/or TRICS (also TRAVL for London) to establish the baseline on trip generation for monitoring the plan and setting targets.

It is recommended that the first stage is to calculate the likely trip generation of a site in the absence of a travel plan. Subsequently, a revised figure for trip generation should be calculated taking account of the impact of the measures included in the travel plan. Once the local authority has validated the trip generation information, this should then provide the basis for monitoring the plan and setting targets. ACT/TRIC’s approach emphasises that it is important that the methodology used to determine the trip generation figures and mode splits

"is logical, transparent and explained concisely in a manner easy to understand” 29 .
Setting targets

Targets are very likely to be an important aspect of any residential travel plan. They should be in place from the outset and agreed as part of the travel plan ahead of planning consent, but will need to be the subject of on-going review.

The information-base used in the travel plan will be crucial for the establishment of sound targets for the development. As explained above, this is likely to draw on information gathered as part of the LTP transport assessment process which itself may involve either a bespoke survey, or the use of database information such as TRICS/TRAVL.

In selecting targets, it is important that they are realistic in terms of the site in question and the measures provided, and that they reflect the reductions in car use expected as a result of the plan measures. They should demonstrate significant positive change over what would be seen if no travel plan measures were adopted (i.e. the base case). In assessing the magnitude of change possible, data may be drawn from databases like TRICS/TRAVL as well as a range of indirect sources. In addition, available evidence on the impact of other types of smart measure - such as school and workplace travel plans and personalised travel planning - can be taken into account. Targets for the development should also reflect targets set out in the LTP (and other relevant policy) to ensure that the development is contributing towards regional and local objectives, such as for traffic reduction.

The main target in the travel plan will normally be a measure of the level of car trips originating from the site. This will usually be the number of car trips per unit per day, though in some cases an additional target may be adopted for the level of car trips per unit in the morning peak. The travel plan can include targets for the use of alternative modes - for example bus ridership or walking and cycling trips - or for the use of on-site facilities, such as the local shop. Other possible targets include levels of car ownership and travel mode to work and school based on national statistics and monitoring questionnaires. Qualitative targets (for example, level of awareness of the travel plan) can also be useful in indicating the impact of the plan on perceptions and possible future travel behaviour.

In theory, if the travel plan is successful, target levels of car use should be achieved from the start of occupation, since the conditions affecting car use are 'designed-in' to the development. Inevitably though, some travel plan initiatives will only become fully effective once they have been fine-tuned and vigorously promoted over time. Moreover, some initiatives will benefit from achieving 'critical mass' as the development becomes settled. For example, a travel plan launch event can only take place once a reasonable number of people are in occupation. Targets may, therefore, need to be revised as part of the plan review process. This should enable targets to be tightened to become more demanding over time - if appropriate. It should not, however, result in targets being weakened as a result of a failure to achieve the initial target set in the travel plan unless the reason for failure was unavoidable.

A range of possible targets is set out below.
Table 3: Setting targets - examples of targets

- **Car trips per household** - targets set on the basis of predicted trip rates for the development, recorded on a daily basis and in the morning peak hour. TRICS, PTAL ratings and data for similar developments can inform the base case, and targets need to take account of the impact of the travel plan measures.

- **Uptake of alternatives** - targets for bus ridership, take-up/renewal of travel passes; membership and use of car clubs; registration and participation in car share scheme; cycle counts and bike buddy schemes participants; pedestrian counts. Comparisons can be made with usage at similar developments, to establish a baseline.

- **Car ownership and mode of travel** - trip based targets may be supplemented by targets related to car ownership, travel to work by mode and travel to school by mode (using National Travel Survey information).

- **Environmental protection targets** - contributing towards pollution targets in Air Quality Management Areas.

- **Travel plan awareness targets** - for example, a target can be established to ensure a significant percentage of residents are aware of the travel plan and its purpose. Such qualitative information can help in understanding the degree of willingness to change travel behaviour.

Monitoring the plan

Monitoring travel plans is central to ensuring that the aims of the plan are delivered in practice, and more generally, that the development accords with the terms of the planning permission. Where the monitoring process reveals failures to achieve the objectives and targets outlined in the original plan, there will need to be an opportunity to review the plan and to identify remedial action to put the plan back on track. Where targets are met, plans may still need to be adapted over time, with the introduction of new measures and targets to deliver ongoing changes in travel behaviour.

The monitoring of the plan is normally the responsibility of the travel plan coordinator or person with that function, though more independent monitoring may be appropriate in some cases. A monitoring schedule and outline of the approach to monitoring should be set out in the original travel plan. This should explain what is being monitored, how frequently and the reporting lines. Monitoring reports will be of key interest to the developer and local authority to ensure the targets and objectives of the plan are being met.

In some cases, such as in Surrey, West London and in Poole, the local authority has secured funding from the developer as part of the section 106 agreement to help cover the costs of monitoring the travel plan. This is a legitimate to use of a section 106 agreement in as far as it covers the costs incurred by the development.

In addition, the findings from the monitoring reports should be reported back to residents and the local authority to ensure the information is shared with those affected by the travel plan. A summary of the findings of the monitoring programme should be made available in an easily digestible form (such as a community newsletter), with clear explanation of how the travel plan can help the community to make further progress.
Monitoring of the residential travel plan should normally take place on the following basis:

- Early on in the occupation period of the site - for example, triggered by 75% occupancy to provide the information base for review of the plan;
- Annually or at least every two years thereafter to provide ongoing information on the impact of the plan. Monitoring should take place over a wide range of time periods to reflect the different pattern of journeys that can be generated by residential development. This should include the morning and evening peak periods, as well as, for example, a mid-afternoon survey which may indicate people making the school run by car.

A wide range of information can be monitored to demonstrate the impact of the travel plan, and to better understand which measures are proving successful. Where clear targets or other objectives have been included in the travel plan, the monitoring regime should include the associated measure(s). Examples of monitoring information include:

- Multimodal traffic/travel surveys to and from the site on a regular basis;
- Automated traffic counters;
- Uptake of free travel vouchers provided to new residents;
- Renewal of travel passes e.g. when free passes expire;
- Cycle and pedestrian counts on routes into the development;
- Use of cycle stands provided;
- Uptake of car club membership;
- Use of car parking spaces and any problems with overspill parking;
- Liaison with local bus/train companies for estimates of use of key services;
- Walking to activities e.g. school;
- Travel diaries;
- Recorded comments on residents’ feedback forms.

**Good practice - monitoring arrangements and funding**

Monitoring arrangements for Crest Nicholson’s development at Poole Quarter are clearly set out in the section 106 agreement which lists a contribution for annual travel plan monitoring by Poole Borough Council (£12,000 over five years) and provision of three automated traffic counters (also £12,000). Monitoring includes:

- A snapshot travel survey of residents (including trip diaries) after first 50 units occupied and again 12 months later
- A personalised travel plan visit to each household within a month of residents moving in (carried out by Crest/Housing Association staff).
- Annual surveys from first occupation to monitor take up of measures (personal visit recommended).
- Trip diary survey of households one year after initial occupation of first phase and then in years 3, 4, 5 and the year after 486 units completed. This information will be considered in conjunction with snap shot survey results to help in determining measures.
- Data analysis of automated counters.

- Liaison with sales office, bus and rail operators to gain feedback on uptake of travel incentive measures.

Monitoring arrangements for Grand Union Village in West London are also set out in a section 106 agreement and specify that the travel plan co-ordinator should monitor and review the travel plan and submit regular returns to the local authority. Returns must say how the travel plan has operated during the relevant preceding period and specifically how effective the plan has been in implementing its recommendations and in achieving its targets. It must be accompanied by a revised travel plan for approval by the local authority. Returns must be submitted on the date two years after the approval of the first plan and thereafter at two yearly intervals for a minimum period of six years or later until the owner has disposed of its interest in the site.

Information gathered as a result of plan monitoring should be valuable in enabling the review of the travel plan. The review process should consider progress in achieving the targets and objectives established in the plan and how different plan measures are operating. To enable the plan to evolve over time, it will be important to identify an ongoing management budget for the plan as part of the section 106 agreement. As explained earlier, this should enable an ongoing source of funds to cover the management and monitoring of the plan and its associated measures. The collation of such information from all sites should enable the local authority to build a picture of changes in travel patterns across their area and enable them to assess their effectiveness.


Enforcement and sanctions

For local authorities and developers agreeing a travel plan, it is important that, whatever the range of measures included, they are deliverable. In addition, it is important that such commitments are enforceable, though plans can be agreed without specified sanctions.

In general, it is recommended that travel plans are secured through a section 106 agreement which runs with the land. The elements of the travel plan implementation need to be clear such that there is an enforceable commitment for a period of time following completion, or substantial completion, of the development. Targets set out in the plan should be achieved by the end of the period identified.

From the outset there should be clarity about what will happen in the event that either:

- The developer fails to meet essential obligations agreed within the travel plan - e.g. to deliver all key measures agreed;
- The travel plan fails to meet its targets.

Suitable sanctions can be agreed between the developer and the local authority, and included in the section 106 agreement. Examples of sanctions include:

- 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 implementing the previously agreed measures
where these have not been put in place;

- Payments to the local authority to cover the cost of taking action to deliver the agreed target(s) where these have not been achieved;
- 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).

The agreement can specify what sanctions are to be invoked and at which stage. For example, it could say that in the event of non-compliance a Travel Plan Notice will be served on the developer (see Good Practice - Travel Plan Notice, below). This notice would set out what the developer was expected to do to implement the travel plan and by when. Under this mechanism, non-compliance would entitle the authority to take whatever action was necessary to enforce the notice, and to recover the cost of such action from the developer.

Whatever sanctions are included in the section 106, it is important that the agreement enables the authority to use its discretion in enforcing them. For example, there should be scope for the authority to decide that a particular measure that was initially listed as an essential travel plan obligation, is no longer appropriate and does not have to be delivered (though the agreement could specify that this funding is used for other measures). They should also take account of the degree of control the developer will have over any of the required actions.

**Good practice - Travel Plan Notice (for enforcement)**

Crest Nicholson’s development at Poole Quarter, Dorset highlights a useful arrangement for enforcement of the travel plan as part of the section 106 agreement. The section 106 states that if Crest Nicholson (the developer) fails to comply with its obligations in relation to the travel plan, then the authority will serve a Travel Plan Notice specifying the steps required to be taken. If this is not complied with the authority may recover the cost of taking action to enforce the notice. Serving the notice is seen as a last resort, following attempts to resolve matters through negotiation. In practice the developer is enthusiastic about the travel plan.

Another useful mechanism has been included to address potential parking problems. Developer contributions for a parking management scheme in the neighbouring area will only be triggered if it is demonstrated that there is pressure on parking as a result of the new development. This also provides an incentive to the developer to manage traffic and parking pressures emanating from the site and thereby avoid future costs.

Where local authorities and developers do not wish to include specific sanctions as part of the travel plan process, much progress can be made by negotiation and by establishing clear time scales for the development of the travel plan (these can be detailed in the section 106).

In addition to including specific sanctions within the agreement, the authority may want to include specific contingency arrangements - that is, provision for certain measures to be taken if and when they turn out to be necessary.
5. Strategic framework

Importance of the policy framework

A robust policy framework is important in supporting negotiations to secure residential travel plans. This is particularly the case in relation to decisions about when a travel plan will be required and what it should contain as well as policies on parking. The more comprehensive, integrated and explicit the authority’s policy framework is in relation to sustainable spatial planning and transport requirements and the role of travel plans, the more easily a requirement for a residential travel plan can be justified. Some key policies are at the regional level e.g. regional planning strategy and transport strategy, but the LTP and the LDF proposals and policies are the most relevant.

Local authorities may refer to a requirement for a residential travel plan or related issues under one or more policy areas, such as sustainability, transport and parking. What is particularly important, however, is to be able to demonstrate that residential travel plans and improvements required by them are consistent with the strategic spatial policies for land use and transport established in the LDF and LTP.

A wide range of policies covering a number of issues that apply to residential development can affect the development of the ensuing travel plan. Addressing a number of policy requirements in these areas may require a unique design approach and/or package of travel plan measures. The following list is included to indicate the potential complexity of the policy context (though not all of these will apply to every development):

- Sustainable development policies;
- Public transport, walking and cycling policies (including travel plans);
- Parking policies;
- Social inclusion and accessibility policies;
- Housing development policies including location, density, design & parking;
- Affordable housing policy;
- Regeneration policies;
- Mixed land use policies;
- Safety and security policies;
- Protection and enhancement of the environment;
- Use of natural resources.

Local authorities are at different stages of policy development and few have developed a comprehensive set of LDF documents, related Supplementary Planning Documents (SPDs) and a revised comprehensive LTP which comprise ’good practice’, although some have relevant existing policies and Supplementary Planning Guidance (SPG). The existence of the strong national framework supports the requirement for residential travel plans whether or not authorities have fully developed their local policies.
Policy framework

National

Residential travel plans should help contribute to the delivery of sustainable development in line with national objectives. They therefore need to address the national planning policy statements/guidance that cover sustainable transport, parking, accessibility, housing and mixed communities, social inclusion, and community safety and security.

Until 2003, Planning Policy Guidance Note 13: Transport (revised in 2001) provided the main justification for travel plan requirements. It promoted sustainable transport objectives and explicitly established provision for travel plans, floorspace targets for when travel plans should be sought and that either a planning condition or section 106 agreement could be appropriate.

Since then there has been a major overhaul of the planning system as now established by the Planning and Compulsory Purchase Act 2004 and related regulations - planning now has a statutory duty to deliver sustainable development. Local development documents need to develop spatial strategies for their area and policies need to address the full range of sustainability issues including social exclusion, environmental impact and the achievement of sustainable communities.

At the core of the new system is the objective of achieving sustainable development, as set out in Planning Policy Statement 1: Delivering Sustainable Development (PPS 1). Many of the principles directly support the use of travel plans, including residential travel plans, from both an environmental and social viewpoint. Key principles include:

"Regional planning bodies and local planning authorities should ensure that development plans contribute to global sustainability by addressing the causes and potential impacts of climate change - through policies which reduce energy use, reduce emissions (for example, by encouraging patterns of development which reduce the need to travel by private car, or reduce the impact of moving freight), promote the development of renewable energy resources, and take climate change impacts into account in the location and design of development."

"Development plans should also contain clear, comprehensive and inclusive access policies - in terms of both location and external physical access. Such policies should consider people’s diverse needs and aim to break down unnecessary barriers and exclusions in a manner that benefits the entire community." (PPS 1, page 6).

Regional and local development plans

The revised planning policy framework comprises the national Planning Policy Statements and guidance notes, the Regional Spatial Strategies prepared by Regional Planning bodies, and Local Development Frameworks, prepared by local authorities. The LDF is a folder of documents of which the Core Strategy is the key. The Core Strategy, while relating upwards to both national and regional policies, is the spatial expression of the Council’s overall strategy for its area, as set out in the Community Strategy. The planning policy framework provides the starting point in the consideration of planning applications for the development or use of land.
Opportunities and implications in relation to residential travel plans derive primarily from the following revised national Planning Policy Statements / Guidance and related guidance (note that some are subject to consultation at the time of writing) covering transport, planning, housing, parking, affordable housing, accessibility / community need, social inclusion and safety and security:

- PPS1: Delivering Sustainable Development
- PPG 13: Transport
- PPS 12: Local Development Frameworks
- PPS 11: Regional Spatial Strategies
- Safer Places - The Planning System and Crime Prevention, and
- The Sustainable Communities Plan

Together these provide a broad policy context for residential travel plans that should be reflected in the detail of the LDFs and associated planning guidance. Common issues relate to parking provision, meeting local needs and facilitating social inclusion through improved accessibility, and minimising the need for car trips.

In most cases, the case studies illustrated strong policy frameworks that supported the requirement of travel plans and reflected national sustainability and transport policy, although there were different emphases and some fine-tuning still to do. Some case study authorities provided specific policy guidance of relevance to residential travel planning within the SPGs that had been adopted as well as more general policies, such as those relating to sustainability, parking and transport assessments (see examples below).

**Good practice - policy framework**

Surrey County Council has several years’ experience of requiring travel plans as part of the development planning process. It currently has around 200 travel plans which it has requested in this manner, of which around 12 specifically relate to residential developments. The impetus for developing travel plans is seen to have come from the need to reconcile development pressures in Surrey with aspirations to manage traffic growth and to reduce the environmental impact of travel. As such, Surrey’s Structure Plan includes Policy DN2: Movement Implications of Development, which states that:

‘Development will only be permitted where it is, or can be made, compatible with the transport infrastructure in the area. The implications of all proposed development for transport and the environment should be assessed. Measures to encourage walking, cycling and the use of public transport should be incorporated in development proposals. Where the transport implications of development would lead to a harmful impact on other people or the environment, mitigation measures should be included.’

In order to achieve this, the Plan states that:

‘The local planning authorities may require planning applications to be supported by an assessment of the transport impact. Measures to increase the proportion of walking, cycling and use of public transport will be set out in an accompanying travel plan.’
Good practice - supplementary guidance document

A key policy document supporting the residential planning process in the London Borough of Merton is its Supplementary Planning Guidance on Sustainable Transport (April 2004). This states that where a development is likely to have a significant impact on the transport network, developers will be required to submit a Transport Assessment (TA) and a travel plan aiming to reduce car travel to and from a proposed site and increase use of more sustainable forms of transport. A section on planning obligations says the council will work with Transport for London and developers to create links between their sites and the nearest public transport interchange points and that where new developments require improvements to public transport developers will be required to make contributions through planning obligations.

Useful appendices provide fairly detailed guidance on the section 106 process; preparing a transport assessment; travel plans; car-free development and car clubs; and parking standards (reinforcing the guidance in the Unitary Development Plan).

The new planning system giving planning authorities the opportunity to amplify development plan policies will be amplified in SPDs and confirms that such SPDs will, under the revised planning system, form part of the planning framework for the area. Although not part of the statutory Development Plan, they are required to be subject to sustainability appraisal and public consultation in accordance with the authority’s statement of community involvement and can be a material consideration of significant weight in the determination of planning applications. Local authorities looking to develop a SPD on residential travel plans might consider:

- Transport Assessment requirements and the relationship to travel plans;
- The relationship of travel plan requirements to the new requirement for design and access statements;
- When a residential travel plan is required (see below);
- Modal split or car/public transport trip targets;
- Car parking requirements and management (see below);
- Residential travel plan design, content and implementation;
- Housing development including design, affordable housing, density;
- Sustainability/sustainability checklist;
- Planning obligations including sample S106 agreement;
- Social inclusion/accessibility and regeneration requirements.

30 Planning Policy Statement 1: Delivering Sustainable Development, Office of the Deputy Prime Minister 2005


Local transport plans

Of particular importance is the integration of the LTP with the LDF. Government advice is that “Local transport policies need to reflect and support the aims of the core strategy development plan document. Land use planning, in turn, needs to take account of the existing transport network and plans for its development.” 32
LTPs are the subject of recent national guidance that highlights the need for LTPs to help deliver ‘shared priorities’ for local transport planning agreed between DfT and the Local Government Association. The shared priorities include improvement of access to jobs and services, particularly for those most in need, in ways that are sustainable; improved public transport; and reduced problems of congestion, pollution and safety. In addition, emphasis is placed on achieving wider quality of life issues, including healthy communities, neighbourhood renewal, quality of public spaces, better streetscapes and the UK’s targets for reducing the emissions of greenhouse gases.

As explained in Chapter 2, LTPs should also include an accessibility strategy (outside London). This presents an opportunity to ensure that accessibility to and from new residential developments is given adequate attention in conjunction with wider accessibility issues. The LTP also sets out infrastructure and other investment plans, and large-scale residential developments may refer to the LTP in respect of potential contributions to improvements to the transport network.

LTPs will provide an important reference base for the development of residential travel plans in future and can help identify:

- Existing gaps in transport provision, to help establish the need for a developer to provide or contribute to provision;
- Sources and timing of funding that may be forthcoming for service improvements over a wider area, so that the implications for residential travel plans in the area is clear;
- Existing and proposed networks for walking, cycling and public transport provision so that travel plan proposals can plug into any gaps;
- Proposed major and minor schemes for improved transport provision in relation to the networks and interchanges, to support the request for pooled contributions from a number of smaller developments (including residential developments).

As part of the policy framework it is helpful to have mechanisms in place to facilitate liaison with public transport operators, developers and travel plan co-ordinators to ensure co-ordination and anticipate opportunities. These may have been established on an ongoing basis and/or for the development of the LTP.

**Integration and consistency**

The policy framework is more robust if the inter-relationship of policies and their detailed interpretation is considered early in the plan process. Policies ideally would be integrated horizontally (e.g. across the same level in the hierarchy of plans) to ensure that they work together to reinforce residential travel plan requirements and provide a clear and consistent basis for car trip and parking controls; as well as vertically. For example, parking policies can support or undermine travel plan and related policies that aim to reduce car trips. In view of the range of policy objectives that may apply in the case of residential development, any conflict or inconsistency needs to be addressed as early as possible to minimise tension within the planning decision-making process.

National guidance sets out the suggested mechanisms for linking the LDF with the Community Plan and LTP. The LDF policies and these plans and strategies should be consistent in respect of requirements and expectations regarding the role, and objectives and requirements, for a residential travel plan. Within an authority there will be other smarter choices initiatives such as e.g. personalised travel marketing, PT
smartcards, discounts for people covered by travel plans etc, which offer further potential for linkages and synergy with residential travel plan requirements.

The process linkages between planning and transport will be increasingly facilitated by the requirement for the sustainability appraisal to be carried out on local development documents from the outset of the preparation process. This appraisal is required by the Planning and Compulsory Planning Act and incorporates the requirements of the 'Strategic Environmental Assessment' (SEA) Directive, the term used for the European Directive 2001/42/EC on the assessment of the effects of certain plans and programmes on the environment. The SEA Directive places emphasis on the assessment of alternative options, public involvement and monitoring. It is proposed that the requirements of the sustainability appraisal and the SEA Directive will be wholly integrated and Government guidance is being prepared.

Sustainability in this context is widely defined in the sustainability appraisal guidance and PPS 12: Local Development Frameworks to include timescales, environmental, social and economic impacts and resource use. Sustainability appraisal is now an ongoing process rather than a 'snapshot' assessment, and must also be carried out throughout the preparation of the SPD.

**Potential conflicts**

As discussed in Chapters 2 and 3, the strategic policy framework should include key policies that establish when a travel plan is required, and levels of required parking provision (maxima). However, there are other policies and related guidance that can also have an indirect impact on the content of travel plans.

In particular, the research found that conflicts can arise as a result of the way guidance on crime and community security is interpreted. Crime prevention is a key issue in the new PPS1: Delivering Sustainable Development. Guidance was published in 2004 as Safer Places: the Planning System and Crime Prevention which outlines ways to design out crime and achieve improved community safety, including ways to reduce the fear of crime which can undermine the quality of life. Crime prevention can be a material consideration in the determination of planning applications and the issue can cut across strategies for accessibility, town centre management, social inclusion and others.

The Safer Places guidance outlines the scope for developing policy and includes examples of key principles and design approaches/measures which can be applied in public and private development and management. Potential conflict arises when steps taken to design out crime (reduction of multi-mode access and permeability, establishment of fencing or barriers) undermine the effectiveness of residential travel plan measures which seek to create movement networks that are secure and convenient to link places that people want to go. Conversely, the informal surveillance provided by residents moving freely between different parts of the site on foot can be seen as conferring a greater sense of safety.

Pre-application discussions and early project co-ordination, along with feedback from similar developments, will help identify areas of potential conflict and allow time to find solutions.

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Key policies

There are two particular key areas of policies that should be addressed. As indicated earlier travel planning is likely to be most effective where key policies have been set out so that developers are clear as to where a residential travel plan may be requested and associated requirements. Good practice suggests that policies and associated SPDs (such as for Transport Assessments - see Chapter 3) should clarify the circumstances that would lead to a requirement for a residential travel plan. Rather than setting down hard and fast thresholds such as number of dwellings or trip generation, a more effective approach would be to set out the characteristics of the development and its context that would, together, result in a travel plan being required. Factors to clarify include:

- Size and nature of housing development where a travel plan is required;
- What the residential travel plan should contain;
- When the residential travel plan should be submitted (i.e. submitted with the planning application);
- Who should pay for preparing, implementing and monitoring the plan.

The second key policy area is parking as highlighted in chapter 2. PPG 3: Housing includes guidance on parking standards and refers to a standard of 1.5 spaces per dwelling. However, research suggests that this policy is still not being consistently applied and is often the subject for local debate. Car parking standards still vary widely across the country and the willingness of authorities to reduce parking standards often relates to community and political pressure. With the effective introduction of travel plans that deliver the targets and outcomes determined the acceptability of tightening up on parking policies should increase. The review of parking strategies by the DfT through the LTP process will also assist.
Checklist 5: Preparing the policy framework

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<tr>
<th>Yes/ No</th>
<th>Checklist 5: Preparing the policy framework</th>
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<tbody>
<tr>
<td></td>
<td>Relate local policies to national guidance on sustainability, planning and transport</td>
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<td></td>
<td>Aim for horizontal and vertical integration and consistency in policy. Ideally policy conflicts should be identified early on and resolved.</td>
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<td>Prepare and publish Supplementary Planning Documents to clarify key policies such as when to require a transport assessment, when to require a residential travel plan, targets, how to prepare and implement a residential travel plan, and parking policies</td>
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<td></td>
<td>Ensure sustainability appraisal is carried out as part of the process of preparing policy documents</td>
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<td></td>
<td>Aim for comprehensive Local Transport Plan that includes information that supports travel planning, such as proposals which could be funded through pooled contributions</td>
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<td></td>
<td>Develop and incorporate targets in policy - these could include trip generation, modal split targets, trip length, etc, as well as qualitative goals on travel behaviour</td>
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6. Concluding messages

The emergence of residential travel planning

The revision of *PPG13: Transport* in 2001 was an important step forward in the development of travel plans. As a result, travel plans for access to schools, work places and leisure destinations have become increasingly prevalent. While it was always implicit in *PPG13* that travel plans should also be required of developers by local authorities for residential developments, until recently there was little experience of this taking place in practice.

Times are changing, however, and the research undertaken for this guide has encountered a growing body of experience in the development of travel plans for residential development, notwithstanding the current overall limited activity in this area. It appears that the interest in residential travel planning is being driven by at least two factors:

**First**, the increased acceptance of travel planning as a legitimate part of the transport planning toolkit and an effective mechanism in helping both to reduce congestion and to promote the use of sustainable modes of transport.

**Second**, the pressure for new housing and its transport implications in many parts of the country is driving the need to find new ways of ensuring the development of more sustainable communities.
Key findings

It is important to realise that most of the practical experience in residential travel planning reviewed in this guide is still at an embryonic stage. Nevertheless, a number of important findings shine through.

In particular, developers are clearly prepared to engage in the travel planning process for residential developments and certain local authorities have shown the way forward through their policies and practical support for travel planning. There are a range of positive examples of developers working alongside local authorities in the development of well-integrated residential travel plans that are likely to have a positive impact in terms of promoting more sustainable transport choices. In addition, developers are taking on the responsibility of developing and funding a range of ‘smart choice’ transport measures which are likely to benefit new residents travel choices, as well as helping to mainstream these transport solutions in development discussions.

The Travel Plan Pyramid demonstrates the importance of ensuring good foundations for a travel plan through choices about the location, density and design of new development. Without this, it is likely that other travel plan measures will have much less, if any, impact. It is clear that residential travel plans should never be used as a means of justifying development in a location which in principle would be unacceptable, but be seen as a tool to help developments overcome problems of accessibility and perform better in terms of sustainable access to and from the site.

It is notable, however, that few developments reviewed during the course of this research have fully integrated all the aspects of travel planning demonstrated in the Travel Plan Pyramid. In particular, generous parking standards can risk undermining the potential of residential travel plans in some cases, by enabling high car ownership and car use at these sites. The future of residential travel plans depends on local authorities at officer and member level, as well as developers, having more confidence that developments with low parking standards can be attractive to potential buyers and function well in practice. This message needs to be recognised by developers and their marketing teams, as well as council officers and members who are often nervous of being seen to be ‘tough’ on parking or ‘anti car’. Promoting travel plans is about improving accessibility for all - not being anti car. It is a process of evolution and seeks to address a wide range of key challenges for society.

The following checklists highlight what developers and local authorities can do to promote the success of residential travel plans.
### Checklist 6: What can local authorities do to help the process?

<table>
<thead>
<tr>
<th>Yes/No</th>
<th>Establish clear policies and guidance in support of residential travel plans and provide references to supporting planning and transport policies.</th>
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<td></td>
<td>Challenge conventional thinking about parking standards and encourage low parking allowances as far as possible. This may require changing attitudes from council members and officers.</td>
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<td>Enable officers’ time for discussion, development and monitoring of travel plans through adequate resourcing and training in this area.</td>
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<td>Provide current and comprehensive local data on transport movement and provision, and on local accessibility.</td>
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<td>Provide other examples of good residential travel plans that have been developed in the area and availability of travel plan expertise.</td>
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<td>Ensure section 106 agreements for residential travel plans set out clear mechanisms for monitoring and review of plans and handover arrangements for the future management of the plan.</td>
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<td>Use the LTP to identify transport schemes serving the wider area to which developments should contribute.</td>
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<td></td>
<td>Facilitate liaison and partnerships with public transport operators and other agencies with an interest or contribution.</td>
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<td></td>
<td>Work in partnership with developers to ensure a mutually acceptable scheme which is deliverable.</td>
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Checklist 7: What can developers do to help the process?

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<th>Yes/No</th>
<th>Description</th>
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<td></td>
<td>Ensure development proposals reflect the wider objectives for planning and transport established in local authority Local Development Frameworks and LTPs.</td>
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<td>Welcome the marketing potential of creating ‘green’ developments through residential travel planning and mainstream these messages in promotional material.</td>
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<td>Initiate early discussions with the local community about the project.</td>
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<td>Propose low parking requirements in new developments and utilise the extra space for development or open space. Demonstrate how parking will be managed to avoid overspill into neighbouring areas.</td>
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<td>Appoint competent professionals to develop the travel plan who are committed to seeing the plan through from inception to implementation.</td>
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<td>Be prepared to provide financial resources to fund necessary travel plan measures for a sufficient period of time as to ensure their sustainability.</td>
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<td></td>
<td>Identify clearly how responsibility for the travel plan management will be transferred to residents in future.</td>
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<td></td>
<td>Work in partnership with local authorities to ensure a mutually acceptable scheme which is deliverable.</td>
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Lessons for the future

Residential travel plans will be increasingly viewed as part of the panoply of transport tools available to local authorities to promote more sustainable travel behaviour. This guide offers the following insights into the successful application of residential travel plans in future:

Getting the process right

- Developers and local authorities should initiate early discussions about developments to ensure that requirements for transport assessments and travel plans are made clear at the pre-application stage, working in partnership.
- Local authority requirements should be explicit and in the public domain.
- Rather than specifying exact thresholds for the requirement of residential travel plans, local authorities can help indicate when they will be required by identifying the characteristics of the development that would trigger the need for a travel plan.
- Local authorities and developers should evaluate the proposed travel plan against the list of travel plan components suggested in Checklist 2.
- The local authority can control the content of the travel plan and ensure its implementation most effectively by requiring the plan at the time of the planning application and prior to commencement of development.
- Normally, travel plans should be secured via a section106 agreement, though conditions may also be
used to secure some design measures such as cycle parking as long as this does not undermine the integrated nature of the travel plan. Where a section106 is utilised, it should set out the timescales associated with the overall travel plan and its components, and the implementation. In addition, it should specify explicitly how elements that relate to financial obligations and related triggers/ timescales, future management and funding, performance measures and any remedial action will be secured, as well as monitoring.

- Following implementation of the travel plan the monitoring and review process should be initiated and subject to regular discussion between the developer and the authority - the responsibility for this action should be explicit.

**Design and content**

- Residential travel plans should be site specific and respond to the transport issues and priorities identified in the transport assessment. They should provide a combination of both the physical (e.g. parking restraint/infrastructure/permeability) and management (e.g. services/marketing) measures necessary to address the transport impacts arising from the new development.
- The plan should provide a holistic package in which individual measures are integrated into the design, marketing and occupation of the site rather than 'retrofitted' once the development is established. The measures should aim to achieve more sustainable travel patterns from the outset, rather than cutting car use incrementally once the residents are in occupation.
- The Travel Plan Pyramid demonstrates the importance of ensuring good travel plan foundations through the choice of location, density and design as part of the initial layout and design and access statement.

**Management, monitoring and enforcement**

- As most residential travel plans are prepared in advance of occupation of the site, it is particularly important that management, monitoring and enforcement arrangements are agreed at the outset as part of the section 106 negotiations.
- A monitoring schedule should be agreed as part of the original travel plan to ensure that the impact of the plan is understood and the plan is regularly reviewed and updated to ensure that targets are achieved. Funding arrangements for monitoring should also be agreed, with the likely contribution of a payment by the developer for this activity.
- The management structure for the travel plan should be specified at the outset. Whichever the choice of arrangement is preferred there should be a clear purpose, accountability and ability for the group identified to take action.
- Ultimately the developer should remain responsible for the travel plan until such point as it can be shown to have been successfully implemented. The point at which handover of responsibility can take place should be agreed at the outset - most likely by linking this to the achievement of core targets in the plan.
- The mechanism for handover of the travel plan from the developer to residents beyond the period of developer implementation, or the time at which no further action is required, should be well thought through. It is likely that in a development where the responsibility for plan implementation can be passed to a management company working in liaison with a residents’ committee the impacts of the plan will be most enduring as long as the residents have been party to the ongoing process.
- Travel plans should generally be secured through a section 106 agreement, such that there is an
enforceable commitment for a period of time following completion of the development. Targets set out in the plan should be achieved by the end of the period identified. In enforcing such targets, suitable sanctions should be agreed between the developer and local authority at the outset, to be invoked if the targets are not met.

The strategic framework

- The development of travel plans will be greatly assisted by having a policy framework in place to support travel plan requirements and their enforcement should it become necessary. This should relate local policies to national guidance on sustainability, transport and housing.
- Support for travel plans can be set out as specific policies in Local Development Frameworks and Local Transport Plans. In addition, Supplementary Planning Documents should clarify key policies such as when to require a transport assessment, when to require a residential travel plan, targets, how to prepare and implement a residential travel plan, and parking policies.
- Care is needed to ensure that conflicts do not arise in implementing differing policy objectives. For example, the need to ensure that new development meets the requirements of Safer Places: the Planning System and Crime Prevention, while continuing to promote easy access for people on foot and bike.
- Local authorities should ensure that a sustainability appraisal is carried out as part of the process of preparing policy documents.

38 Safer Places: The Planning System and Crime Prevention, Office of the Deputy Prime Minister, 2004

Appendix 1: summary case studies

1. New England Quarter, Brighton

Organisations

- Developers: New England Consortium including, QED, Network Rail Infrastructure Ltd and J Sainsbury Developments Ltd
- Local Authorities: Brighton and Hove City Council

Overview of development

The New England Quarter redevelopment is taking place on the 8 ha former Brighton Station goods yard, following planning approval in September 2003. The aim is to create a highly accessible urban neighbourhood incorporating a mix of uses, including a supermarket, two hotels, residential accommodation comprising 355 new homes, and a language school with student accommodation. The resident population should reach 1,000 with employment opportunities for the same number. Occupation is likely to take place by the end of 2005/06.
Reasons for the travel plan

The requirement for the New England Quarter development to be an exemplar of transport practice and sustainable development flows largely from the policies established in Brighton and Hove’s Local Plan. In addition, the Plan is accompanied by Supplementary Planning Guidance note 3 (Brighton Station Site) which provides specific advice on the development of the site. Transport policies established in the Local Plan encourage 'low car' development and promote the use of travel plans for developments with significant transport implications.

Main elements of the travel plan

The site is centrally located with good existing transport links by foot, bike and public transport. The requirements for the travel plan were secured as part of the section 106 agreement for the site. This established the overarching requirement for a Travel Plan Framework to be prepared for the whole site, before the commencement of the development. The Travel Plan Framework includes the following measures:

- the establishment of a Travel Plan Framework Manager;
- the requirement for all other stakeholders to identify Travel Plan coordinators for individual blocks. These should be located within a building on the sites and will need to be supported by a representative of senior management of the organisation.

The document also established the travel plan process for individual plans by identifying the general objectives for travel plans for the site and the key processes they should include (eg. surveys, consultation, monitoring etc.). The Travel Plan Framework was developed by consultants who are also acting to fulfil the role of Travel Plan Framework Coordinator.

Provision of facilities that reduce the need to travel: the site is centrally located in Brighton and has convenient access to local facilities. In addition, the development includes a supermarket and commercial facilities incorporating offices and space for small businesses.

Parking restraint: The development aims to be 'low car' in line with policies established in the Council’s SPG 4: Parking Standards which state that 1 space/residential dwelling is the maximum both within and outside CPZ areas. Some blocks (eg. E and F) are proposed to have much lower levels of parking (8 parking spaces for 170 dwellings).

Site design: The aim is to create a new urban neighbourhood which blends in well with the existing streetscape in the area. Emphasis has been placed on ensuring good permeability of the site and enhancing local accessibility through the provision of improved walking and cycling networks and local facilities.

Travel Plan Coordinator: The Travel Plan Framework Coordinator will work with individual travel plan coordinators to ensure consistency of travel plans across the site.

Public Transport Provision: the development includes a new transport interchange next to the station, but does not include upgrades to existing public transport services which are deemed adequate.
Walking and cycling facilities: the aim is to create a walkable neighbourhood with seamless links to surrounding areas. Traffic-free routes are being developed with other footway improvements, tree planting and street furniture. In addition, secure cycle parking is provided and shower/changing facilities are encouraged in each development block.

Car Club: The requirement to provide a car club is not detailed in the travel plan, but is established under the sustainability schedule of the S106. The development of the car club on site is the responsibility of individual developers of each block in liaising directly with Smart Moves, which is the company developing car clubs across Brighton.

Travel plans for other developments: Travel plans will be prepared for each individual development block and need to be consistent with the overarching Travel Plan Framework.

Marketing and provision of information to residents: The approach varies among different development blocks but includes: welcome travel packs, questionnaires and the development of an information intranet.

Targets and outcomes

While the Travel Plan Framework refers to the need for individual plans to identify targets on the reduction of car use, it does not establish any targets for the site as a whole.

Arrangements for monitoring and enforcement

The development of individual travel plans and the Framework travel plan is required under the S106 agreement. The Travel Plan Framework specifies the need for regular monitoring and review of individual plans. The developer is also required to report on progress in achieving the sustainability measures outlined in schedule 4 in the S106 agreement. This includes progress in developer car club/car share measures.

The overall progress of the development of Travel Plans will be monitored by the Travel Plan Framework Coordinator in consultation with the Council. Failure to fulfil S106 requirements should be picked up by the Council’s S106 Officer and could be subject to enforcement procedures. Beyond this, the S106 does not include any specific sanctions or penalties for developers if they should fail to provide the travel plans required.

Management

The Travel Plan Framework Coordinator holds the central role in managing the travel plan process. They will be responsible for liaising with individual travel plan coordinators and in preparing a Review Report for circulation to the Council and other bodies. This post is funded by contributions from developers of each block.
Emerging good practice

- Example of tiered approach, demonstrating the cascade from local plan policies, SPG to the development of a Travel Plan Framework, and then, individual travel plans;
- The appointment of a Travel Plan Framework coordinator to oversee subsequent plans should help ensure consistency;
- Overall view of creating an urban neighbourhood puts emphasis on ensuring design and layout promote access by foot and bike.

Further information

Peter Tolson, Principal Transport Planning Officer, Brighton and Hove City Council. Email: Pete.Tolson@brighton-hove.gov.uk

2. Queen Elizabeth Park, Guildford, Surrey

Organisations

- Developer: Laing and Linden Homes
- Local Authorities: Guildford Borough Council and Surrey County Council

Overview of development

Queen Elizabeth Park (QEP) has been developed on the site of the former Guildford Barracks, 2.5km to the north of Guildford town centre. The site is 23 ha and is located within the existing residential area of Stoughton, with some local facilities and places of employment within the immediate vicinity. The development includes the following:

- 525 Residential Units (35% which are affordable);
- 9,000 m² of employment development comprising 50% B1(a):Office and 50% B1(c): Light Industry;
- 557 m² crèche; and
- 1,858 m² Health and Fitness Centre;
- 60 bed Nursing Home; and
- Community core with shop units (960m²).

The development gained planning permission in 2001 and is now 75% occupied with a final development stage to be completed.

Reasons for the travel plan

Surrey County Council has several years’ experience of requiring travel plans as part of the development planning process. The impetus for developing travel plans is seen to have come from the need to reconcile development pressures in Surrey with aspirations to manage traffic growth and to reduce the environmental impact of travel. Surrey’s Structure Plan includes policies aimed at managing the movement implications of development and supporting the use of travel plans. In addition, Surrey’s LTP includes a range of targets including those aimed at stabilising traffic levels and increasing the proportion of journeys by foot, bike and public transport. The need for the travel plan for QEP was identified by
Surrey County Council highways planning engineers as part of the transport assessment process. In response, the developer commissioned consultants to prepare a travel plan and oversee its implementation. The travel plan was developed in close consultation with County Council officers and was finalised in spring 2001.

**Main elements of the travel plan**

The travel plan provided a framework for addressing residential travel planning at QEP, as well as the travel plan requirements for business units on the site. Specific components of the plan included:

- **Provision of facilities that reduce the need to travel**: QEP is located with fairly convenient access to local facilities. In addition, the development includes 14 employment units, a crèche, community hall and health centre.

- **Parking restraint**: QEP has a relatively high parking standard across the site (1.5 space/unit average). Some households have 2 spaces, with restrictions on car parking mainly applying to the affordable housing units. There are incidences of overspill parking occurring on access roads.

- **Site design**: The site is designed to be attractive for walking and cycling with good connections with the surrounding network. The development includes the provision of secure, weatherproof parking for bikes. In addition, the section 106 includes directions to maximise permeability within the site. It requires the developer to safeguard potential access points if the opportunity for land purchase should occur in future years. However, a lack of integration between the measures set out in the travel plan and the design of the site resulted in the improved bus service being unable to access all parts of the site as planned.

- **Travel Plan Coordinator**: To date, the consultants appointed by the developers have been developing and promoting the travel plan and fulfilling the role of part-time Sustainable travel plan Manager. They have been instrumental in briefing sales staff on the green transport credentials of the site, in preparing the welcome pack for new residents, and in helping to launch the new bus route and car share scheme.

- **Public Transport Provision**: upgraded bus service subsidised for 5 years to increase bus frequency and also to ensure that the bus route enters the site. In addition, a Â£200 bus travel voucher was offered for each new household.

- **Walking and cycling facilities**: Provision of new footways and crossings and advanced stop lines for cyclists on surrounding roads. A Â£30 cycle voucher was offered to each new household, and a bicycle users group and a cycle buddy scheme was proposed. Walking was to be encouraged by the provision of pool umbrellas and pool personal attack alarms.

- **Car Share**: The 234 Car Share scheme is due to be launched in June 2005. It is aimed mainly at people travelling to and from employment units at QEP, but is also open to residents on the site. The scheme will also involve employers providing a guaranteed ride home and preferential parking.

- **Travel plans for other developments**: Company travel plans were meant to be developed for the individual employment units on the site.
Marketing and provision of information to residents: All residents are given welcome information packs containing a QEP newsletter, walking, cycling, train and bus information along with information about claiming cycling and public transport discounts. A website has been established providing further information about accessing the site and internal workshops were proposed to explain the travel plan and its purpose.

Targets and outcomes

QEP’s travel plan established three main targets:

- **Target 1** - The development, inclusive of all land uses, to generate external single occupancy car trips on the wider highway network that represent no more than 62% of total external person trips.
- **Target 2** - Each Company Travel Plan to have a target of no more than 55% of all trips by single occupant car journeys;
- **Target 3** - School Travel Plans to reduce the proportion of school travel by car by 12% over the three year period.

The plan identifies the 75% occupancy rate of the development as the trigger point for the first monitoring survey. This survey revealed the following:

- **Target 1** - had been met with access by single occupancy cars to the site representing 37.2% of total trips.
- **Target 2** - had been slightly revised with the aim that overall no more than 55% of employees working on the site to be arriving as sole occupancy car drivers.
- **Target 3** - had been amended, and was no longer required of the developer who was asked instead to assist with a school travel survey.

It should be noted, however, that there is a potential flaw in the choice of Target 1. In the original plan it states that the targets should reflect the targets established by Surrey in its LTP, in particular the aim to reduce total car mode share from 68% in 1999 to 62% in 2006 and 56% by 2011. However, for the targets set in the TP, this mode share percentage is applied to single-occupancy journeys only, not total journeys. As a result, in the first monitoring report the consultants found the target for QEP was being successfully met. However, for total car access to the site, car mode share is 79.8%, which is considerably above the average in the surrounding area and the target set in Surrey’s LTP.

Arrangements for monitoring and enforcement

The first monitoring report for QEP was prepared by the developer’s consultants at the 75% occupation level (as set out in the section 106). Subsequent monitoring reports will take place annually under the direction of the Sustainable Travel Manager. While targets for access to and from the site by private car are established in the travel plan, Surrey County Council’s travel plan officer envisages that any necessary enforcement will take place by negotiation. Penalties for failure to achieve targets have not been included in the Section 106 agreement. As part of the section 106 agreement, the sum of Â£2,000 was paid by the developer to Surrey County Council as a contribution towards the Council’s costs of monitoring the Plan.
Management

The original travel plan states that the ongoing responsibility for the travel plan will pass to the full-time Sustainable Travel Plan Manager for a period of at least 3 years beyond the initial period of occupation. The plan suggests that this post will be funded by the occupiers of QEP. There is, however, some uncertainty how this will be made to operate in practice. As a result, it is likely that the Travel Plan will be handed over to the Management Company to take forward. In addition, there is also a QEP Residents Committee who will be interested in the ongoing role of the travel plan.

Emerging good practice

- The ‘green transport’ credentials of the site were included from the outset in the marketing of properties to potential residents. The sales staff was briefed by the developers’ consultants who had prepared the travel plan and the travel benefits were sold as a positive extra for new residents;
- A welcome pack was circulated to all new residents which included a range of useful information tailored to the site, and substantial offers for free public transport use and cycle discounts;
- The ongoing liaison between the County Council travel plan officer and the developer has ensured that the plan has evolved over the initial stages of occupation;
- A clear programme for monitoring the plan was established from the outset. This will enable the plan to modified and adapted over time.

Further information

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3. High Royds, Leeds

Organisations

- Developer: Raven Group
- Local Authority: Leeds City Council

Overview of development

High Royds is a mixed use development on the outskirts of Leeds, which is being built on the site of a former mental hospital located within the green belt. The development is comprised of 541 homes together with 2,354 sq m of office space, and an assisted living facility. It is 20% affordable housing. Historically High Royds Hospital was a self-contained community and the new development incorporates many of the original buildings and surrounding amenities. While the housing is situated on an inner site of 23 hectares, this is set within 82 hectares of attractive grounds with gardens, woods and other recreational facilities. The site’s section 106 was signed in January 2005.
Reasons for the travel plan

Although there is no formal travel plan document, a package of measures to encourage sustainable travel has been secured through the section 106 agreement. This was prompted by the concerns of local residents. While otherwise positive about the development, they were worried about the effect of more traffic on the already congested A65, a main corridor into Leeds. A Transport Assessment was submitted alongside the planning application. This was required in a planning framework for the site originally issued by the council in 2000. The main proposals to address traffic generation were initially developed through community-based workshops.

Main elements of the travel plan

Location - High Royds is relatively close to the mainline stations of Menston (1km away) and Guiseley, providing access to Leeds, Ilkley and Bradford. Public transport links to these stations and nearby towns are a key element of the travel plan - see below. The grounds have attractive recreational facilities, including football and cricket pitches, which will be open to the public, providing amenity both for new residents and for residents from neighbouring areas.

Parking - parking on the site is to be provided at 1 - 2 spaces per dwelling, with additional spaces for visitors.

Site design and facilities - several aspects of the site design support sustainable travel:

- A network of footways and cycle ways will be provided throughout the parkland and is designed to provide improved pedestrian links to Menston Station and the town centre. Three existing Rights of Way on the site have been enhanced and it will be possible to cycle through the development, but not to drive through.
- On-site bus shelters with real time information, have been incorporated into the scheme. Bus gates and barriers will be strategically placed so that buses are able to drive freely through the development while cars have access only. One of the site entrances will only be used for buses, cyclists and pedestrians.
- Money has been set aside by the developer for children’s play equipment, though this will not be spent until 100 dwellings are occupied, at which stage a newly established residents liaison committee will be consulted about the choice of equipment.
- Space for a part-time GP and dental surgeries, a convenience store and children’s nursery have all been included in the development, and these facilities are expected to reduce the need to travel. The developer has also made a commitment through the section 106 agreement to procure a sports and social club on site. The office space on the development is a potential employment opportunity.

Off-site infrastructure - a package of highways improvements has been agreed with an estimated potential cost of approximately £3m. These include advanced stop lines for cyclists at each of the improved junctions serving the site. In addition there is a commitment to providing an off-highway bus area at the local school, which is located opposite the site on the A65.

Public transport - the developer will provide a free shuttle bus service, with adequate capacity to meet demand (i.e. potentially two buses), between High Royds and Menston Station. The free shuttle will also make runs to Menston and Guiseley during the day to assist High Royds residents with shopping. The bus
will be open to non-residents too so that it provides a service for people in these areas to reach the High Royds parkland. The developer will also contribute Â£300,000 towards new railway rolling stock as part of a bid by Metro, which would provide additional rail services at peak times.

**Car club** - the developer will establish a car club on site and maintain it for two years after first occupation and at least until occupation of the 200th dwelling.

**Promotional measures** - the developer will provide residents on the development with a free one year bus/rail pass (one per house). Subsequently Metro will provide residents with discounted tickets - a perk that is offered as standard in Leeds for participants in company travel plans. The discount is 25% for the first year of occupation and 10% for the third. The same Metro deal will be available to office workers on the site and to people in the assisted living scheme.

**Other travel plans** - offices on the development have been required to draw up individual travel plans.

**Targets and outcomes**

Although the scheme has no formal target, the package of sustainable transport measures is expected to reduce vehicle movements on the site from 404 vehicle movements per hour in the peak hour to 308 - a comparative reduction of 24% from the predicted baseline figure.

**Arrangements for monitoring and enforcement**

Most of the transport related measures have been secured through a section 106 agreement, though a separate planning condition was used to secure cycle parking and to require that the offices on the developments draw up individual travel plans. Although there no specific sanctions for non-compliance, there are detailed timescales, which tie initiatives to the occupation of units. No formal monitoring mechanisms have been included in the section 106 but it is anticipated that the local authority will be able to check on the impact of the measures by tracking the take up of public transport and the level of traffic on the main corridors into Leeds.

**Management of the plan**

Responsibility for implementing the plan falls to the developer but will pass to the site’s management company in the long term. The site management company will be appointed by the developer to be responsible for the enforcement of planning obligations alongside the maintenance of communal areas. Liability for running the shuttle bus and for providing the car club passes to this management company after two years (or in the case of the car club, at least until occupation of the 200th dwelling). The developer is expected to actively move on such responsibilities, making the occupiers aware of them. In the case of the shuttle bus the developer has a specific commitment to assisting the management company for six months in taking on this responsibility.

Key decisions about the plan are to be made by a residents liaison committee, which operates as a kind of steering group. The developer is expected to arrange for this committee to meet for the first time on occupation of the 100th dwelling. This will consist of representatives of the developer and the council, together with four representatives from occupiers in the community, who are to be nominated by the council. There will also be representatives from Menston and Guiseley and the on-site business tenants.
Emerging good practice

- There has been extensive engagement with residents from nearby communities, and measures were developed in response to local concerns, with close involvement from the local authority;
- The scheme combines significant infrastructure improvements, such as enhanced public transport and cycle and pedestrian-friendly site design, with substantial financial incentives for sustainable travel;
- The development includes several facilities likely to reduce the need to travel, including surgeries, a nursery, shops and offices;
- The scheme builds on site-specific opportunities, such as the amenities offered by the original grounds and the proximity of local railway lines;
- There is a clear division between long term responsibilities for the plan - which belong to the site management company - and the power to make decisions about the plan - which resets with the residents’ liaison committee;
- There has been a precise estimate of the reduction in traffic expected as a result of the improvements.

Further information

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4. Poole Quarter, Poole, Dorset

Organisations

- Developer: Crest Nicholson (South)
- Local Authority: Borough of Poole Council

Overview of development

Poole Quarter is a centrally located residential development to the east of Poole town centre, consisting of 512 homes, including flats, houses and sheltered housing. It has 35% affordable housing. The site was formerly occupied by a gas works and its development has brought about environmental improvement for the area. The scheme is a catalyst for the delivery of the Central Poole Regeneration Strategy. Construction began in Autumn 2004 with first occupation in Summer 2005.

Reasons for the travel plan

Specific guidance helps to set the policy context for residential travel plans in the borough. Poole’s Supplementary Planning Guidance on Parking Guidelines (February 2004), states that

"recent experience of residential developments with low car parking provision has shown that all developments of 50 dwellings or more should be required to produce an active residential travel plan, and in some circumstances it will be a requirement for smaller developments."

Poole also has Supplementary Planning Guidance on Travel Plans (April 2003), which outlines the process by which these will be developed and implemented in relation to new development. In the case of Poole Quarter, council members were concerned about the overspill parking and traffic likely to result from this large, high density scheme and the travel plan helped to address these concerns. The need for the
travel plan was considered from at an early stage, as part of initial planning discussions, and Crest Nicholson, working with the consultant Foxley Tagg, was proactive in integrating the travel plan into the design of the scheme from the outset. An Environmental Impact Assessment, including a Transport Assessment, was submitted as part of the planning application, and the detailed residential travel plan was subsequently developed through discussions between the borough’s travel plan officer, the developer and the developer’s consultant.

Main elements of the travel plan

Location - Poole Quarter is close to the town centre with good access to many off-site facilities, including bus and rail stations, several large employers, a hospital, shops and a school. In addition, land yet to be developed to the north of the site is to have a surgery and food retailers according to the Poole Local Plan.

Parking - parking on the site will be provided at 1 space per unit plus visitor spaces giving a ratio of approximately 1.1. Visitor parking will be managed and charged for.

Site design and facilities - a pedestrian and cycle route crosses the site and is designed to encourage access on foot or by bicycle to the town centre. The design includes a central focal space with a children’s play area and other play areas are incorporated into housing courtyards. A toucan crossing is to be provided on the main road into Poole from the site. Secured covered cycle parking for residents and visitors is distributed across the development. New bus stops and shelters will be installed in the immediate vicinity.

Off-site infrastructure - the developer is funding a series of off-site highways measures, including a contribution of Â£10,000 to a Safe Routes to School scheme, Â£15,000 for a cycle link between the development and a nearby recreation space and Â£25,000 for a one-way system to prevent rat-running in an adjacent area. Improvements will also be made to a nearby roundabout.

Public transport - the developer will provide a five year subsidy towards an enhanced bus service (to be operational on occupation of the 50th unit). The scheme is to be reviewed on payment of the third instalment, with an option to move funding across to other measures if the bus service is not performing in terms of passenger use.

Car club - a car club is to be established on the site, with additional vehicles added according to demand. This will be set up in partnership with Western Challenge - the housing association developing the nearby Seldown site.

Promotional measures - the developer is funding an extensive promotional package to encourage new residents to use travel alternatives:

- Sales and marketing literature will emphasise the sustainable nature of the development in terms of location and transport choices, and will also promote the travel plan. A travel plan notice board will be located outside the sales office and regularly updated.
- Residents moving into the development will be offered a flexible voucher to obtain discounts on public transport or cycle purchase, worth up to Â£100 per household. Alternatively, they can claim one free car club membership for a year. The voucher will be awarded to up to three successive occupiers of the property.
- A residents’ travel plan pack will introduce the plan and provide lots of promotional materials for
travel alternatives, including easy-to-read rail and bus timetables; details of regular travel offers; car club literature; cycling and walking route maps; information about joining the local walking bus scheme for travel to school; details of discounts on cycle purchase and cycle accessories; application forms for the flexible voucher offer; and details of a personalised journey planning service.

- The development’s sales and marketing staff will be trained in personalised journey planning techniques and will undertake this for new occupiers as part of the normal induction process, in order to promote sustainable travel to work, school and leisure activities.
- A travel plan web site will be set up and maintained for the development, and a confidential car share database created from first occupation.

**Targets and outcomes**

The overall target is to achieve, on average, a maximum of three car trips per day per unit. The target is only triggered once 50 units are occupied.

**Arrangements for monitoring and enforcement**

The plan is secured through a section 106 agreement which states that the developer cannot commence development until the residential travel plan has been submitted and approved by the council. The agreement includes both a schedule of obligations under Highways Works and a schedule of Essential Travel Plan Obligations, covering the car club and bus services. Under the agreement, if the developer fails to meet its obligations in relation to the travel plan then the council will serve a Travel Plan Notice specifying the steps that must be taken. If this is not complied with the council may then take this action itself, and recover the cost from the developer.

Monitoring of the plan includes:

- A snapshot travel survey of residents, including trip diary information, after 50 units are occupied and again 12 months later;
- Annual surveys to monitor take up of alternatives and information from the sales office on the take up of travel incentive measures;
- A trip diary of households one year after initial occupation of the first phase and then in years three, four, five and the year after 486 units are completed.
- Data analysis from automated traffic counters installed at site entrances;
- Data from the personalised travel plan visits to each household carried out by sales staff.

Monitoring falls initially to Crest Nicholson, though the section 106 includes a contribution by the developer to cover the authority’s involvement in the monitoring process.

**Management of the plan**

The developer is responsible for implementing the plan and is expected to undertake the role of travel coordinator. This includes ongoing negotiations with public transport operators and the local authority and setting up and running a travel plan steering group for three years after occupation of 486 units. The travel plan steering group is expected to include the developer, the developer’s consultant, the managing agent, housing associations, the local authority travel plan officer, bus and train operators and the developer from a neighbouring site (which also has a travel plan). Once construction is completed, custody of the travel
Emerging good practice

- The scheme has a wide breadth of measures, and combines infrastructure improvements, such as enhanced public transport and pedestrian-friendly site design, with an extensive promotional package;
- The plan integrates promotion for sustainable travel into the normal sales and marketing activities of the site, and includes special training for sales and marketing staff;
- The section 106 agreement includes the mechanism of a Travel Plan Notice to ensure that the travel plan can be implemented in the event of non-compliance;
- Provision has been made for the management of the scheme by a travel coordinator and a steering group, with subsequent handover to the residents’ management company;
- The section 106 agreement includes a funding contribution towards the cost of the council’s future involvement in the monitoring and review process for the travel plan;
- The need for a residential travel plan is explicit in local authority Supplementary Planning Guidance.
- The need for the scheme was introduced early in the planning process and an appropriate package of measures developed through close partnership working.

Further information

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5. Plough Lane, Wimbledon, London

Organisations

- Developer: David Wilson Homes
- Local Authority: London Borough of Merton

Overview of development

The Plough Lane development is mainly residential, comprised of 570 flats (around 30% affordable housing) and some commercial use buildings. The site, which was formerly Wimbledon football club, is situated at the junction of two ‘A’ roads in a suburban area. Work is expected to commence in late summer 2005.

Reasons for the travel plan

The site was originally considered to have a low Public Transport Accessibility Level and is located within an Air Quality Management Area. The proposed housing density was higher than would normally be sought for such an area and there was concern about the ability of the highways network to cope with the expected level of car trips. Merton’s Supplementary Planning Guidance on Sustainable Transport, (April 2004), states that where a development is likely to have a significant impact on the transport network, developers will be required to submit a Transport Assessment and a travel plan.
Main elements of the travel plan

Location - the new housing is between two large industrial areas providing potential access to employment.

Parking - parking will be provided at 0.78 per unit, with the vast majority of it underground. Bays will be allocated to residents with a limit of one per household.

Site design and facilities - a central amenity area has restricted access for cars. There are routes across the development for pedestrians and access to a riverside walking trail. Facilities on the site include a doctor’s surgery that has been incorporated in its redevelopment.

Off-site infrastructure - the developer is funding improvements to a nearby junction including a bus lane and bus stops, pedestrian facilities and a cycle priority box. There will also be a contribution made towards a Safe Routes to School scheme.

Public transport - an existing service has been diverted to provide a link to the hospital and town centre. Subsidy paid for this by the developer will reduce if the service is successful, providing an in-built incentive for the developer to promote the service effectively.

Car club - a city car club is being established for the site. A local car hire company will be moving into one of the business units and will open a car club as part of its rental. The developer is responsible for procuring the car club and identifying suitable accommodation within the site.

Promotional measures - with funding from the developer, each new household will receive an oyster card, giving pre-paid use of public transport (one per household to the value of £100); a discount on Thameslink; one free membership of the car club; secure cycle lock-up and a free cycle (or alternatively, cash for buying cycle equipment). A travel information pack for households will include cycling maps and public transport information, and all residents will be given an induction session about public transport. A community website will provide travel information to both homes on the site and to adjacent businesses.

Targets and outcomes

The target for the travel plan is 0.28 vehicle trips / unit in the am peak and 0.24 vehicle trips / unit in the pm peak.

Arrangements for monitoring and enforcement

Most of the travel plan measures have been secured through a section 106 agreement, though planning conditions cover the provision of car parking and cycle parking. The developer’s consultant is expected to produce a yearly report, measuring traffic flow and the modal split of the site. This will include traffic counts at the entrance in the peak hour; a questionnaire to determine how people are travelling; figures for the use of buses serving the site; use of the car club and use of cycle facilities. The section 106 includes sums to be paid by the developer if the targets are not met: if the target trip rate is exceeded then £10,000 a year for five years has been set aside to pay for further travel measures.
Management of the plan

The travel plan, including monitoring, will be managed by a consultant on behalf of the developer, for the first five years. After this the intention is that responsibility for the plan will pass to the site management company.

Emerging good practice

- The scheme combines infrastructure measures such as the bus service and highways improvements for vulnerable road users, with an extensive promotional package to encourage the take up of sustainable travel;
- Under the agreement, the cost of the bus service to the developer declines as the service becomes more popular, providing an inbuilt financial incentive for the developer to market this effectively and encourage good take up;
- Sums have been set aside to pay for additional measures in the event that the targets are not met - providing a mechanism for effective enforcement;
- Provision has been made for ongoing management of the scheme by a travel coordinator;
- The need for the travel plan was raised at an early stage - in pre-application discussions - and the local authority worked closely with the developer’s consultant to produce a package of appropriate measures.

Further information

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6. Grand Union Village, West London

Organisations

- Developer: Taylor Woodrow and Bryant Homes, through Grand Union Vision Ltd;
- Local Authorities: London Borough of Ealing and London Borough of Hillingdon

Overview of development

Comprises a mixed development with 705 residential units (446 flats and 259 houses), including 70 designated for key workers, 35% affordable homes and the remainder for first time buyers, family buyers and investors. Other uses include retail outlets (560sqm), restaurants, offices (15,420sqm), a community centre, a health centre, a leisure centre, crÃ¨che and green open space. The site is a 54 acre brownfield site straddling the Grand Union Canal in Northolt, suburban London. It includes existing office buildings, warehousing and employee amenities formerly used as Taylor Woodrow Headquarters. The planning process began in 1999, started on site in 2002/03 and about 100 units are complete and occupied. The development is phased and anticipated to be complete in 2008.
Reasons for the travel plan

This site was the first mixed development site where a travel plan was sought and therefore before national guidance and the full evolution of local policies. The requirement for a travel plan was supported by a number of UDP policies in place at the time aimed at reducing the need to travel; providing alternative travel facilities; encouraging sustainable development through parking and traffic generation control; addressing environmental impacts; and identifying special opportunity areas (including this site) where urban village principles would be followed. A number of SPG documents have been prepared which are relevant to the development including: Sustainability Checklist (SPG1), How to do an Urban Design Statement (SPG5), Transport Assessment Reports for Developments (SPG20) and Green Travel Plans (SPG21). Transport Assessments are required when a development is of a scale that it will have significant impact on existing users and the transport infrastructure in the vicinity of the site, with criteria set out in the SPG.

Main elements of the travel plan

Provision of facilities that reduce the need to travel: Within the village there will be a crèche, community centre, health centre, open space and play areas, local shops and a restaurant as well as offices. Within walking distance there are schools, supermarkets, pubs, shops and a leisure centre.

Parking restraint: Residents will have one parking space per private house, private flats have an 85% parking ratio and affordable dwellings 0.6 spaces per dwelling. The limit on car parking spaces and the inclusion of a car club and car sharing are intended to discourage households from owning more than one car. There will be 246 office parking spaces but with restrictive conditions. The refurbished office buildings will have one parking space per 47sqm of floorspace (7,900sqm) but the new office buildings will have a maximum of one space per 100sqm of floorspace (7,520sqm).

Site design: The site is being designed along "urban village" principles, with a population size sufficiently large to promote mixed use, self sufficiency, mixed housing tenure and good public transport links. A bus only gateway will operate on one of the entrances to site. A network of footways and cycle ways are being provided throughout the site with every unit having access to safe and secure cycle parking.

Travel Plan Coordinator: GUV Ltd employed a Green Travel Plan Coordinator prior to the occupation of the site in accordance with the S106 agreement. The Coordinator prepares the initial travel plan and monitors and reviews the travel plan for the whole of the site for 6 years from start of development.

Public Transport Provision: One bus service will be rerouted through the site, with four bus stops inside the village, real time information and increased frequency. This will be put in place once the road network on site is safe and secure for the public and subsidised by phased payments over 3 years from the developer.

Walking and cycling facilities: Priority is being given to pedestrian and cyclists with a 20mph limit throughout the site, road surfacing and traffic claming measures. The on-site cycle routes are being linked to the existing off-site cycle routes.
**Car Club**: Has its own dedicated Car Club, run by Smart Moves Limited with the developer subsidising the establishment and operation costs for the first 5 years up to an agreed limit. The scheme will be put in place once 133 dwellings are occupied and will include subsidised membership for the first 300 residents.

**Car Share**: The West London Car Share website can be used by residents of the village to find a car sharing partner and this will be promoted through the Residents Pack and a direct link from the GUV website.

**Parking management**: A parking survey has been carried out to establish a benchmark. The area may be subjected to a CPZ if it is found that people living, employed at or visiting the development park their cars on the street.

**Marketing and provision of information to residents**: All residents are/will be given information packs containing walking, cycling and bus information along with access to web-based information on the GUV website plus details of public transport costs and possible discounts and how to get personalised journey planning information via mobile phones, telephone and the internet.

**Targets and outcomes**

The travel plan sets a series of targets for measuring the success of the travel plan using the 2003 National Travel Survey and figures from the National Travel Statistics. For car ownership the GTP uses the London National Travel Survey as a baseline and aims to maintain the 2003 car ownership levels of 39% for those with no car, increase to 58% (from 43%) for one car and reduce from 19% to 7% the number of households with two cars.

**Arrangements for monitoring and enforcement**

The draft S106 agreement was signed in May 2002 by Taylor Woodrow and LBs Ealing & Hillingdon. It required a Travel Plan to be prepared within 6 months of the first occupation for the Councils approval and lists what the travel plan should include. Future commercial occupiers are required to submit a travel plan within 6 months of occupation and use reasonable endeavours to comply with the Plan. The travel plan coordinator oversees monitoring and must make returns to the local authority on the date 2 years after the approval of the travel plan and thereafter at 2 yearly intervals for a minimum period of 6 years or later until the owner has disposed on its interest in the site. The S106 agreement includes arrangements for the introduction of on-street parking restrictions and/or CPZ if people within the "village" park excessively on the street.

**Management**

The Grand Union Village Community Trust is being established with funding (Â£140,000 core funding and Â£15,000 for furniture) and support from the developer. Once established is intended to take over the management and implementation of the travel plan through the creation of a subsidiary Transport Working Group (details of its proposed membership is included in the travel plan). Resident’s links with the Community Trust will, it is hoped, encourage the development and future management of the travel plan and the community services.
Emerging good practice

- Good and extensive policy framework including the SPGs
- Comprehensive travel plan in terms of range of measures and use of targets
- Effective use of section 106, especially in providing contingency arrangements whereby unused developer contributions may be diverted to other schemes that achieve similar objectives
- Design of the development includes facilities that reduce the need to travel and provides for permeability
- Funding of bus route extension and real time information
- Use of bus gates to restrict car access to the site
- Inclusion of an enhanced cycle network in the site design
- Local schools have done complementary travel plans
- Good community engagement on transport issues and the inclusion of community concerns following consultation in the final planning application and section 106
- Good working relationship with developer
- Handover agreements with regard to the Community Trust managing the travel plan
- Inclusion of monitoring and management of travel plan
- Inclusion of targets for mode share in travel plan

Further information

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Further information - sources and contacts
Planning policy context

- The Department for Transport website at http://www.dft.gov.uk provides access to a wide range of information and resources. To search for and purchase copies of any current legislation: http://www.opsi.gov.uk.

Car-clubs and car-sharing

- CarPlus: a charity founded in 1999 as the Community Car Share Network, which seeks to promote car clubs and car-sharing as part of a package to measures to reduce private car ownership and use and to increase uptake of more sustainable travel modes. Contact them at: The Studio, 32 The Calls, Leeds LS2 7EW; http://www.carplus.org.uk
- CityCarClubs, The Media Centre, Northumberland Street, Huddersfield HD1 1RL. http://www.citycareclubs.co.uk
- Liftshare: set up in 1997, this organisation runs an on-line database matching people travelling in the same direction at the same time; they offer tailored packages for a range of users, including local authorities, towns and parishes. Contact them at: liftshare.com ltd, Butterfly Hall, Attleborough NR17 1AB; http://www.liftshare.org

Personalised travel planning

- Travelsmart: a joint initiative between the UK’s sustainable transport charity Sustrans and German research group Socialdata, which is developing personalised travel planning schemes around the UK. Contact them at Sustrans, 2 Cathedral Square, College Green, Bristol BS1 5DD; http://www.sustrans.org.uk/default.asp?slID=1090834131404
● Steer Davies Gleave, one of the UK’s leading transport consultancies, which has been involved in personalised travel planning projects in the UK and Australia; contact them at 28-32 Upper Ground, London SE1 2PD; http://www.steerdaviesgleave.com.

Car-free housing developments

● The website http://www.worldcarfree.net is a useful resource for planners, developers, architects and decision-makers on all aspects of car-free housing, containing information from around the world.

Public transport


Networks and partnerships

● A guide on how to set up and run Travel Plan Networks; Good practice guide 314, Energy Efficiency Best Practice Programme. Available from The Energy Savings Trust, 21 Dartmouth Street, London. SW1H 9BP; http://www.energysavingstrust.co.uk/

Useful NGO contacts

● Sustrans, 2 Cathedral Square, College Green, Bristol BS1 5DD; http://www.sustrans.org.uk
● Campaign for the Protection of Rural England (CPRE), 128 Southwark Street, London SE1 0SW; http://www.cpre.org.uk
● Living Streets, 31-33 Bondway, Vauxhall, London SW8 1SJ; http://www.livingstreets.org.uk

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