

January 2015 update

 CITY COUNCIL

# Travel Plans

## Supplementary Planning Document

Leeds Local Development Framework



Supplementary Planning Document  
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## TRAVEL PLAN SPD

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# 1 Summary

- 1.1.1 This Supplementary Planning Document (SPD) sets out the Leeds City Council (LCC) requirements for travel plans and identifies when they are required in support of a planning application. It is also intended for use by existing firms or organisations who wish to draw up a travel plan to facilitate more efficient and sustainable working practices.
- 1.1.2 The supplementary advice contained in this document is intended to elaborate on the policy requirement relating to travel plans included in the adopted Leeds Core Strategy, namely Policy T2:
- “(iv) Travel plans will be required to accompany planning applications in accordance with national thresholds and the Travel Plans SPD.” (LCC 2014)*
- 1.1.3 A travel plan is typically a package of practical measures aimed at addressing the transport needs of a specific development or organisation. The Planning Practice Guidance (March 2014) defines a travel plan as:
- ‘Travel Plans are long-term management strategies for integrating proposals for sustainable travel into the planning process. They are based on evidence of the anticipated transport impacts of development and set measures to promote and encourage sustainable travel (such as promoting walking and cycling).’*
- 1.1.4 The main objective of a travel plan is to provide incentives and / or disincentives for users of a development to reduce the need to travel by non-sustainable modes such as alone by car to and from a site.
- 1.1.5 Travel plans bring a wide range of benefits to the community as a whole and to individual developments and organisations. This is further set out in Section 3.
- 1.1.6 Section 4 and Appendix 1 set out the current Policy context for travel plans and travel planning within the planning system.
- 1.1.7 Section 5 lists the travel plan development thresholds that have been adopted by Leeds City Council. While not absolute, it should be assumed that development exceeding these thresholds will be required to submit a travel plan at the Planning Application stage. Without such documents, applications may not be validated thus delaying any consideration and determination.
- 1.1.8 Four travel plan types are set out in Section 6. The majority of those submitted will be full travel plans.
- 1.1.9 The process for producing a travel plan and content of that plan are described in Sections 7 and 8. This sets out the role of the applicant and the Council in this process. The standard contents of any travel plan are listed by header in Section 8, including the vital role of the Travel Plan Coordinator, targets and indicators, and school travel plans.

- 1.1.10 Section 9 provides a comprehensive, but not exhaustive, list of potential travel plan measures. As no two sites or travel plans will be the same, the measures required or proposed to meet the travel plan objectives will vary. This SPD does not describe each measure in detail, but it is left to the travel plan author, in consultation with the LCC TravelWise team, to select the best combination. Links to further information on many of these measures can be found in Section 11. The Council's TravelWise team may also be able to advise on relevant measures.
- 1.1.11 Section 10 outlines the process for approving, securing, monitoring and review of travel plans. This includes the requirement and formula for calculating the Review fee payable to the Council once the travel plan is implemented. The means of securing the travel plan and associated measures through planning conditions and legal agreements is described.
- 1.1.12 A useful list of contacts and websites is provided in Section 11. This resource is as up-to-date as possible at the time of publication, but travel plan authors are advised to check the links and undertake their own research into any new resources that may become available.
- 1.1.13 The Council has a dedicated TravelWise team which looks at using 'Smarter Choices' interventions to provide a low cost, high value for money solutions to assisting changes in travel behaviours. The team covers a wide range of work including all aspects of travel planning. Any queries relating to this SPD or travel plans in general can be directed to this team. Contact details can be found in Section 11 of this SPD.

## **2 Introduction**

- 2.1.1 This Supplementary Planning Document (SPD) sets out the Leeds City Council (LCC) requirements for travel plans and identifies when they are required in support of a planning application. It is also intended for use by existing firms or organisations who wish to draw up a travel plan to facilitate more efficient and sustainable working practices.
- 2.1.2 The supplementary advice contained in this document is intended to elaborate on the policy requirement relating to travel plans included in the adopted Leeds Core Strategy namely Policies T1 and T2:
- 2.1.3 This document sets out:
- what a travel plan is and what benefits it can deliver
  - what its objectives are
  - when an applicant or developer will be required to submit a travel plan in conjunction with a planning application
  - what type of travel plan is appropriate
  - how a travel plan is best prepared
  - what the travel plan should include
  - how travel plans can be delivered and secured
  - how travel plans will be monitored and enforced
- 2.1.4 As an adopted Local Development Framework document this SPD is a material consideration of significant weight in the determination of planning applications.
- 2.1.5 The contents of this SPD have been prepared in line with the Planning Practice Guidance (March 2014) and should be read in conjunction with that guidance.

### **3 Background**

#### **3.1 What is a Travel Plan?**

- 3.1.1 A travel plan is typically a package of practical measures aimed at addressing the transport needs of a specific development or organisation. The Planning Practice Guidance defines a travel plan as:

*‘Travel Plans are long-term management strategies for integrating proposals for sustainable travel into the planning process. They are based on evidence of the anticipated transport impacts of development and set measures to promote and encourage sustainable travel (such as promoting walking and cycling).’ (DCLG 2014)*

- 3.1.2 A successful travel plan offers users of the development, whether they are employees, residents, students or visitors a choice of travel modes to and from the development site or premises. Travel plans can be used to address the transport needs of all types of new development which have a significant transport impact.
- 3.1.3 Although a travel plan is likely to be required at one point of time, usually in conjunction with a planning application, it will need to be flexible and dynamic enough to take account of the evolving requirements and circumstances of the individual development to which it applies and should be reviewed and updated on a regular basis.

#### **3.2 The Objectives of a Travel Plan**

- 3.2.1 National Planning Guidance sets out that *‘planning should actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable’ (DCLG 2014)*
- 3.2.2 The main objective of a travel plan is to provide incentives and / or disincentives for users of a development to reduce the need to travel by non-sustainable modes such as alone by car to and from a site.
- 3.2.3 The travel plan will, therefore, contain a package of measures to encourage alternative and more sustainable means of transport (such as bus, train, bicycle, walking, powered two-wheelers, and car sharing and car clubs) to a development.
- 3.2.4 Travel plans need to consider all the journeys that may be made to and from a site by anyone who may have a need to visit or stay there.
- 3.2.5 Implementing a travel plan involves a continuous process for improving, monitoring, reviewing and adjusting the measures in the plan to reflect changing circumstances. The plan continues for the lifetime of the development and requires commitment from occupiers and partners. It is not simply means of securing planning permission.

#### **3.3 The Benefits of a Travel Plan**

3.3.1 Travel plans aimed at delivering sustainable transport objectives will bring a wide range of benefits to the community as a whole such as:

- reducing congestion and peak time conflicts
- reducing energy use and harmful transport emissions
- tackling social exclusion and improving accessibility
- facilitating improved public transport through economies of scale and transport efficiency

3.3.2 The Leeds Climate Change Strategy highlights the fact that approximately one third of carbon emissions in Leeds come from transport related sources. The Council has signed up to a target to reduce carbon emissions by 40% by 2020.

3.3.3 Equally important, however, is that effective travel plans can deliver a range of benefits to individual developments and organisations. These include:

- releasing additional site capacity / capital by reducing requirements for car parking spaces and site maintenance costs
- vehicular trip reduction and potential reduction in requirement for off-site highway works
- reducing business operating costs through the introduction of more efficient / sustainable transport options such as pool cars and car sharing
- assisting staff recruitment and retention by encouraging improved accessibility and a wider range of travel choices
- enhancing the image of the organisation by offering sustainable and healthier travel options
- supporting Corporate Social Responsibility and Environmental Management Systems
- promotion of healthy lifestyles, particularly through encouragement of more physical activity and active travel.



## 4 Policy Context

### 4.1 Context

4.1.1 Travel plans are an integral part of the Government's policy for the creation of sustainable communities at the national, regional and local level. They are key elements of both national transport, planning and housing policies as well as of regional and local policies.

4.1.2 The key national and regional policy context is included at Appendix A.

### 4.2 Local Policy Context

4.2.1 The adopted Core Strategy (LCC 2014) recognises that development control provides an opportunity to seek to modify travel demands and habits. This can be through a requirement for travel plan measures to be identified at the planning application stage and secured via planning condition or legal agreements entered into through section 106 of the Town and Country Planning Act 1990.

4.2.2 The Core Strategy therefore includes the following policies:

#### ***POLICY T1: TRANSPORT MANAGEMENT***

*To complement the provision of new infrastructure and Proposal 11 of the Local Transport Plan the Council will support the following management priorities:*

*(ii) Sustainable travel proposals including travel planning measures for employers and schools. Further details are provided in the Travel Plan SPD and the Sustainable Education Travel Strategy*

#### ***POLICY T2: ACCESSIBILITY REQUIREMENTS AND NEW DEVELOPMENT***

*New development should be located in accessible locations that are adequately served by existing or programmed highways, by public transport and with safe and secure access for pedestrians, cyclists and people with impaired mobility.*

*(iv) Travel plans will be required to accompany planning applications in accordance with national thresholds and the Travel Plans SPD*

4.2.3 It is these key local policies that this SPD is designed to amplify.

## **5 When is a Travel Plan Required?**

### **5.1 Context**

- 5.1.1 National guidance requires that travel plans should be submitted with planning applications “*which generate significant amounts of movement*” (para 36 NPPF 2012)
- 5.1.2 The same guidance also requires developments “that generate significant amounts of movement should be supported by a Transport Statement or Transport Assessment”.

### **5.2 Travel Plan Thresholds**

- 5.2.1 In the context of the Leeds District, it is considered that the thresholds for requiring transport assessments previously set out in Appendix B to the Guidance on Transport Assessment (DCLG/DfT 2007) and the Good Practice Guidance on Travel Plans (DCLG/DfT 2009) are the most appropriate for identifying the scale of development which will have a significant travel impact.
- 5.2.2 The thresholds to be used in Leeds are detailed in Table 5.1 below. These generally mirror those thresholds set out the guidance above, although those for A4, A5, B1, C2, C3 and D1 uses have been amended slightly to reflect local experience. If there is any doubt as to whether a travel plan is required then the Leeds City Council TravelWise team should be contacted at the pre-application stage.

**Table 5.1 Indicative Thresholds by Use Class**

<b>Land Use</b>	<b>Use/Description of Development</b>	<b>Threshold for travel plan- by gross floor area (sqm) unless otherwise stated</b>
Food Retail (A1)	Retail sale of food goods to the public – Food Superstores, Supermarkets, Convenience Food Stores	800+
Non-Food Retail (A1)	Retail sale of non-food goods to the public: but includes Sandwich Bars – Sandwiches or other cold food purchased and consumed off the premises, Internet Cafes.	1500+
Financial & Professional Services (A2)	Financial Services – Banks, Building Societies and Bureau de Change, Professional Services (Other than Health or Medical Services) – Estate Agents & Employment Agencies, Other Services – Betting Shops, Principally where services are provided to visiting members of the public.	2500+
Restaurants and Cafes (A3)	Restaurants and Cafes – Use for the sale of food for consumption on the premises, Excludes Internet Cafes (now A1).	2500+
Drinking Establishments (A4)	Use as a Public House, Wine-Bar or other Drinking Establishment.	NA
Hot Food Takeaway (A5)	Use for the sale of hot food for consumption on or off the premises.	NA
Business (B1a)	(a) Offices other than in use within Class A2 (Financial & Professional Services)	1500+
Business (B1b & c)	(b) Research and Development – Laboratories, Studios (c) light industry.	2500+
General Industrial (B2)	General Industry (Other than Classified as in B1), The Former “Special Industrial” Use Classes B3-B7, are now all encompassed in the B2 Use Class.	4000+
Storage or Distribution (B8)	Storage or Distribution Centres-Wholesale Warehouses, Distribution Centres & Repositories.	5000+
Hotels (C1)	Hotels, Boarding Houses & Guest Houses, Development falls within this class if “no significant element of care is provided”.	100+ bedrooms
Residential Institutions – Hospitals (C2)	Used for the provision of residential accommodation and care to people in need of care.	50+ beds
Residential Institutions – Nursing Homes (C2)	Used for the provision of residential accommodation and care to people in need of care.	75+ beds
Residential Institutions – Residential Educational facilities (C2)	Boarding schools and Training Centres.	150+ students
Residential Institutions – Institutional Hostels (C2)	Homeless shelters, accommodation for people with learning difficulties and people on probation.	400+ residents
Student accommodation (C3)	Purpose built or converted accommodation specifically for students	150+ students

<b>Land Use</b>	<b>Use/Description of Development</b>	<b>Threshold for travel plan- by gross floor area (sqm) unless otherwise stated</b>
Dwelling Houses (C3)	Dwellings for individuals, families or not more than six people; living together as a single household (excluding students)	50+ units
Non-Residential Institutions (D1) – Schools*	Schools, colleges, higher education and further education establishments	see paras 5.3.6 to 5.3.8 contact Leeds TravelWise team to discuss
Non-Residential Institutions (D1) *	Medical & Health Services – Clinics & Health Centres, Crèche, Day Nursery, Day Centres & Consulting Rooms (not attached to the Consultants or Doctors house), Museums, Public Libraries, Art Galleries, Exhibition Halls, Non-residential Education and Training Centres	1000+
Non-Residential Institutions (D1) *	Places of Worship, Religious Instruction & Church Halls, Community Centres.	Not normally required – exceptional circumstances only
Assembly & Leisure (D2) *	Cinemas, Dance and Concert Halls, Sports Halls, Swimming Baths, Skating Rinks, Gymnasiums, Bingo Halls & Casinos. Other Indoor and Outdoor Sports and Leisure Uses not involving motorised vehicles or firearms.	1500+
Others (sui generis) *	For example: Stadium, Retail Warehouse Clubs, Theatres, Hostels,	On their merits (to be discussed with LCC Development Department)
Uses where TPS / TP not normally required	Amusement Arcades, Launderettes, Petrol Filling Stations, Taxi Businesses, Car/Vehicle Hire Businesses & the Selling and Displaying of Motor Vehicles, Builders Yards, Garden Centres, PO's, Travel and Ticket Agencies, Hairdressers, Funeral Directors, Hire Shops, Dry Cleaners, Nightclubs, Self Storage facilities	NA

\* Consideration will be given to the levels of all trips generated as well as the specific use proposed. Please contact the Leeds City Council TravelWise team at the pre-application stage for further advice.

- 5.2.3 Applications from existing businesses, organisations and schools seeking to increase car parking capacities without linked development will be required to show that a travel plan has been in place and fully implemented and other options to reduce car use have been implemented.
- 5.2.4 It should be noted that Table 5.1 sets out the development thresholds above which travel plans would normally be expected, but the Local Planning Authority will assess applications on their own merits. This may result in some cases where smaller development warrants a travel plan or larger sites where a travel plan is not justified. Applicants should assume, however, that where a threshold is exceeded a travel plan will be required.
- 5.2.5 Unless otherwise agreed by the Local Planning Authority, a travel plan appropriate to the planning application must be submitted with the main application documents. Failure to do so may result in the non-validation of the application until a travel plan is submitted.
- 5.2.6 For development close to or generating trips on the Strategic Road Network the Highways Agency will be a consultee and may have separate requirements in relation to the travel plan.

### 5.3 ***Other Circumstances Where a Travel Plan May Be Required***

#### **Change of Use applications**

- 5.3.1 Change of use applications will be considered as new development and will require a travel plan if the thresholds set out in Table 5.1 are exceeded.

#### **Extensions and development below the indicative thresholds**

- 5.3.2 Proposals for extensions may also be subjected to a requirement to submit a travel plan when any of the following circumstances apply:
- The scale of the extension exceeds the thresholds set out in Table 5.1
  - In the case of premises or uses which do not have an agreed travel plan, the aggregate size of the existing premises and extension combined exceed the thresholds given in Table 5.1 **and** the extension GFA is more than 20% of the existing GFA (this 20% does not apply to schools – see 5.3.4 below)
  - Where a travel plan would help address a particular local traffic problem associated with a planning application, which might otherwise have to be refused on local traffic grounds.
- 5.3.3 Where it can clearly be demonstrated that an extension would not result in an increase or potential increase in person trips (eg an extension built solely to house machinery), then a travel plan will not be required. This must be agreed with the LPA prior to the submission of the application.
- 5.3.4 In the case of schools, any extension that caters for an increase, or potential future increase, in the number of pupils and / or staff, or where the building will be used for out of school hour's activities or community use, will require an updated travel plan.

## **Multi-occupation of one site**

- 5.3.5 Several small developments or different use types on one site may individually fall below the thresholds set out in Table 5.1. However the cumulative impacts of these individual developments or uses can be enough to justify a travel plan for the site. The requirement for a travel plan should be discussed prior to application submission with the TravelWise team. Additional 'subsidiary' travel plans may also be required in respect of sub-areas, or sub-uses, depending on scale and circumstances e.g. a single subsidiary travel plan for all the small retail uses.

## **Schools**

- 5.3.6 All new schools (including those on the site of an existing school) or new or expanded facilities likely to generate extra journeys to and from the school require the submission of a new or updated school travel plan. All Leeds schools now have a basic travel plan in place, irrespective of whether a planning application has been submitted. However, these were prepared in order to meet DfT and Department for Children, Schools and Families (DCSF) targets for school travel plans (Department for Education and Skills (DfES)/ DfT 2004) and are generally not comprehensive enough to satisfy planning obligations. School travel plans must cover staff and other non-pupil trips to and from the site. The plan must cover any out of hours activities or where the building is used for community use.

## **Universities, Colleges and Educational Establishments**

- 5.3.7 The DfT has recommended travel plans for all Further and Higher Education sites. Travel plans can influence and change both staff and student travel behaviour and they can also benefit the education establishment by releasing parking space which could be better utilised for additional learning or student facilities. Travel plans also offer a range of choices to staff and students on how they travel to the site, encouraging more prospective students and higher rates of staff retention.
- 5.3.8 All Further and Higher Educational establishments will therefore be expected to have a travel plan in place. It is accepted that such plans may be tied into larger 'Transport Strategies', but individual applications must still be accompanied by a travel plan outlining targets and measures for that specific site and links to the overall strategy.

## **5.4 *Scheme Viability***

- 5.4.1 The requirement for a travel plan is determined by Table 5.1 and the sections above. It is considered that the viability of a scheme does not affect the requirement to produce and submit a travel plan with a planning application, but that it might have an influence on the measures proposed. Sections 8 & 9 of this SPD outline the contents to be included in all TPs and potential measures to encourage sustainable travel patterns. Some of these measures are zero or low cost whereas others may incur significant costs. The initial assessment of what measures are appropriate to the development should be based on what is likely to be the most effective. Where a viability case can be

demonstrated (by way of a submitted appraisal), then there may be a case to review the list of measures and the total cost of implementing the travel plan.

## 6 Travel Plan Types

- 6.1.1 Five different types of travel plan have been identified and adopted for the purpose of this SPD. It should be noted that ultimately all travel plans will be full travel plans when they are implemented, but there are several routes for a developer to reach this implementation stage depending on the type of planning application and development proposed. The point at which a planning application is submitted is a single stage in the process of preparing, implementing and reviewing a travel plan.
- 6.1.2 LCC has reviewed the use of travel plan statements, and will not require developers to submit them as part of planning applications at this stage. This position will be reviewed on a regular basis.
- 6.1.3 In order to prevent delay at the application stage if there is any doubt as to the type of travel plan required then the applicant should contact the Local Planning Authority (see TravelWise contact details in Section 11).

### 6.2 *Full Travel Plans*

- 6.2.1 Whenever a travel plan is required, a full travel plan should normally be prepared and submitted with the planning application. It will include clear outcomes and targets together with all relevant measures to ensure these can be achieved. The monitoring and management strategies will also be detailed.
- 6.2.2 Full travel plans are appropriate for applications where the proposed use and accessibility needs are known which will include outline applications where the scale of uses is known.
- 6.2.3 For most types of land use full travel plans will be necessary at the application submission stage. All residential developments, single occupier retail units, cinemas, hotels, gyms, restaurants and health centres etc exceeding the relevant threshold will require a full travel plan at the application submission stage. The lack of a named end-user for the above examples does not prevent the drawing up of a full travel plan. In the case of speculative development the eventual user would be expected to sign up to the measures, targets and processes in the approved travel plan. For office (B1) and commercial (B2 & B8) development, where the end user directly impacts on the type and number of trips generated, Framework travel plans will be required for speculative development.
- 6.2.4 All school travel plans must be full travel plans. It is strongly advised that the LCC TravelWise team is consulted prior to the submission of the application and that an agreed TP is submitted at validation stage. This is to ensure that any infrastructure needed to enable the travel plan to be implemented is identified and scheduled into the design.

### 6.3 *Interim Travel Plans*

- 6.3.1 Wherever possible, a full travel plan should be developed rather than an interim one, however this may not always be possible



6.3.2 Interim travel plans will be acceptable for outline developments where the split and scale of uses is not yet known. For example permission may be sought for a mix of B1, B2 and B8 uses on a single site, and the content of the full and final travel plan would be dependent on the ratio of these uses. Interim travel plans will consist of a substantially completed travel plan including site-wide modal shift targets agreed in advance based on proposed land use, site accessibility, and location. The travel plan delivery strategy is finalised at the point when the use mix is confirmed – usually at the Reserved Matters stage.

#### **6.4 *Framework Travel Plans (and Subsidiary Travel Plans)***

6.4.1 In the case of large mixed use developments with multiple occupants or those commercial (B1, B2 & B8) where the end user is not known a framework travel plan may be appropriate. Where elements of the proposed uses allow and exceed the relevant threshold, e.g. the residential aspect of a mixed use scheme, full travel plans should be submitted at the application stage along with the overarching framework plan.

6.4.2 Framework travel plans need to set overall outcomes, targets, measures and indicators for the entire site. The Framework travel plan should also set the parameters for the requirement for individual uses within the overall development to prepare and implement their own subsidiary travel plans if of appropriate size or provide a structure for the smaller uses to work to within an overall centrally administered plan. The timeframe for completion of individual travel plans is to be set out at the framework stage. Any proposed / required travel plan measures that may require a separate planning obligation within a legal agreement such as Car Club funding or subsidised public transport ticketing must be agreed at the initial (outline) planning stage.

6.4.3 All subsidiary travel plans are to be agreed by the TravelWise team within six months of occupation.

#### **6.5 *Area-Wide Travel Plans***

6.5.1 These will cover larger areas where multiple sites are likely to be developed. They may be prepared as part of a Masterplanning exercise or Area Action Plan. It is likely that at the planning application stage that they would be supplemented by Full, Interim or Framework travel plans.

#### **6.6 *Leeds City Council Corporate and Development Travel Planning***

6.6.1 Leeds City Council has a Corporate Travel Plan designed at reducing the travel impact of the Council as a whole. Travel plan templates have been set up for development where Council staff will be employed. The promoters of such schemes should contact the TravelWise team for advice on preparing their travel plans. This SPD applies equally to all development applicants, including those promoted by Leeds City Council or its partners, with its requirements, including that of review fees, extending to such applications.

## **7 Producing a Travel Plan**

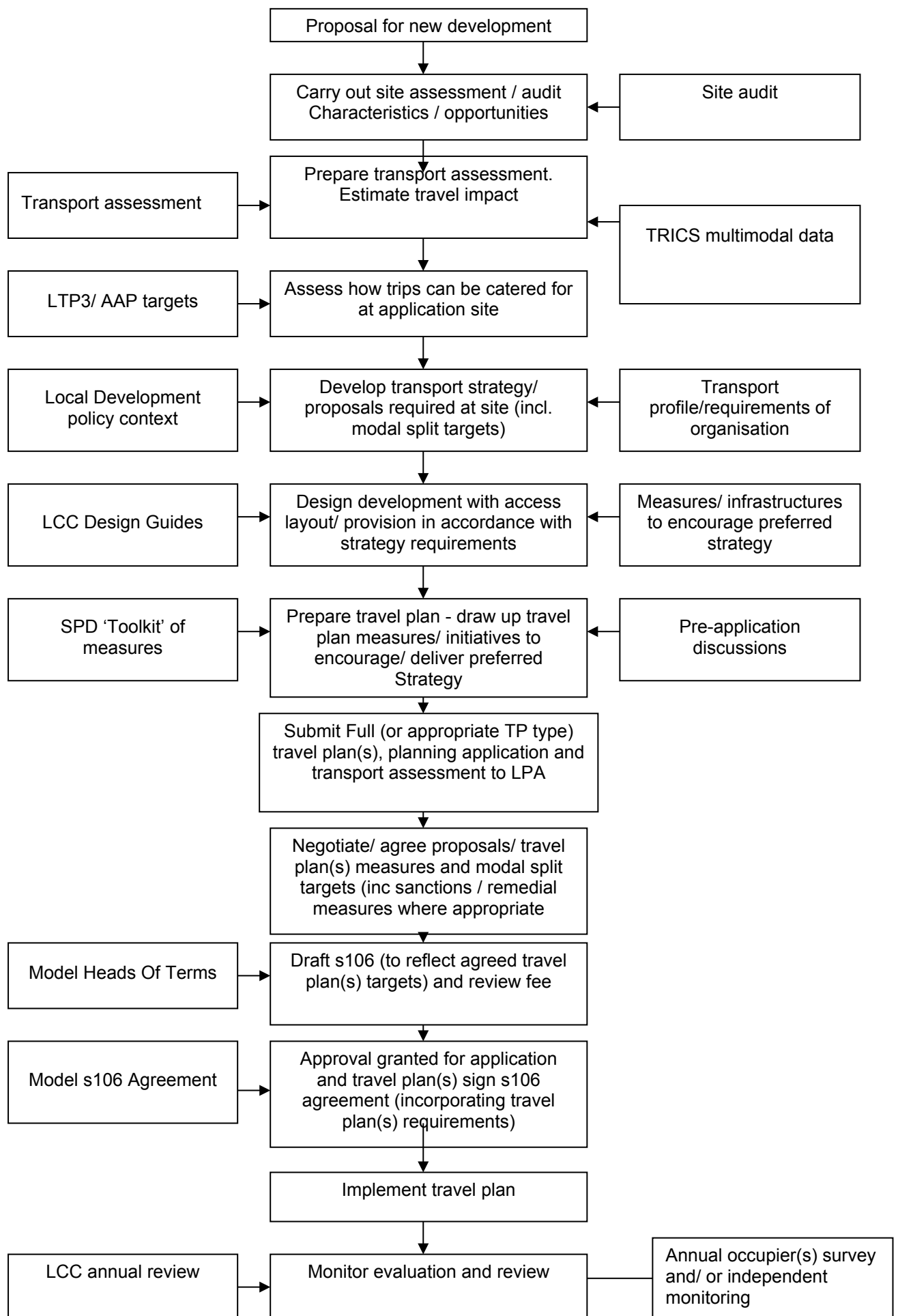
### **7.1 Context**

- 7.1.1 All developments for which a travel plan has to be submitted are also subject to the requirements to carry out a transport assessment. Transport assessments are a comprehensive and systematic process that set out the transport issues relating to proposed major developments and identify what measures will be taken to deal with the anticipated transport impacts of a scheme. They are aimed at improving accessibility and safety for all modes of travel, particularly for alternatives to the car such as walking, cycling and public transport.
- 7.1.2 This assessment of the transport issues relating to a proposed development is integral to the subsequent production of the development's travel plan. The measures that the transport assessment puts forward to address the travel impact of a scheme will form the basis/ structure for the travel plan submitted alongside the planning application.
- 7.1.3 While there is a clear link between transport assessment and travel plans they should always be separate and independent documents.

### **7.2 Travel Plan Process**

- 7.2.1 The recommended process is illustrated in Figure 1 below.
- 7.2.2 The first step in the production of a travel plan is to carry out a site audit incorporating a survey of the site location, including its constraints and opportunities and an assessment of how the predicted travel impact / trips can be catered for in the context of local modal split targets and development plan policies. Travel plans for extensions or relocations of existing uses should include a survey of existing travel patterns to the site. Targeted local consultation may be of use in identifying local issues and potential measures.
- 7.2.3 A transport assessment of the proposed development, including an estimate of its likely overall travel impact is then produced (i.e. the anticipated number of total person trips to and from the site that the development will generate). This estimate can be derived from an appropriate trip generator database such as TRICS.
- 7.2.4 A transport strategy or package of measures can then be drawn up, aimed at delivering modal split targets. These will be a key influence on the subsequent design layout and detailed site proposals for the development. This series of measures / initiatives, designed to encourage and deliver the preferred strategy will form the basis for the travel plan(s) to be submitted alongside the planning application and transport assessment for the scheme.
- 7.2.5 The final agreed measures and modal split targets agreed during the planning application process will then be incorporated into a s106 agreement between the applicant and the council. This will set out how the approved travel plan(s) will be delivered and monitored, including the steps that will need to be taken if targets are not achieved.

**Figure 1 – Transport Assessment / Travel Plan Production Process**



### **7.3 What the Council Can Do To Help**

7.3.1 The production of travel plans will ideally represent a partnership approach between the applicant or developer and the City Council. Metro (the West Yorkshire Passenger Transport Executive) and the Highways Agency are also likely to make up the core of such a partnership with other third parties such as car club providers and public transport operators also involved.

7.3.2 In order to streamline the process as much as possible the Council can offer:

- policy advice and guidance and technical information including travel plan information (based on the information and references given in this document)
- pre-application advice / meetings for major schemes (as part of the Council formal pre-application process) where clarification is sought on the written information available
- appropriate contacts and support for discussions with key third parties (such as WYCA, Highways Agency, car club operators and bus operators)
- information, relevant local data and support during plan preparation and advice on travel plan implementation requirements including annual monitoring, review, and action planning (normally via the City Councils TravelWise Team)
- advice on appropriate modal split targets for specific areas

### **7.4 The Role of the Applicant**

7.4.1 Applicants/ developers can help the travel plan process to be as efficient as possible by:

- accepting the importance of travel plans as an integral part of the transport assessment/ planning application process
- ensuring that the outputs from the transport assessment and travel plan are fully taken into account and integrated with their scheme design and layout
- ensuring that transport assessments and draft travel plans are available prior to pre-application discussions
- submitting a 'complete' planning application (i.e. accompanied by a transport assessment and travel plan(s))
- identifying the contact person(s) with relevant background to act as travel plan co-ordinator(s) for the preparation, implementation, marketing, monitoring and review of the travel plan
- encouraging occupiers and end users of business travel plans to engage with and join the West Yorkshire Travel Plan Network
- taking advantage of joint initiatives involving public transport travel discount schemes, car sharing databases, car clubs, shared travel plan co-ordinators and joint monitoring and evaluation
- working in partnership with the Council and other stakeholders to achieve mutual benefits.

- committing to the ongoing travel plan process, particularly in supporting and marketing the measures outlined within the plan
- collecting of monitoring data and submission of this information to the Council TravelWise team annually
- ensuring that the submitted travel plan accords with this document

7.4.2 There are significant benefits in pre-application discussion to agree the scope of the travel plan to be submitted, especially for larger and more complex schemes. Applicants and their advisers are encouraged to use the LPAs formal pre-application process to contact the TravelWise team prior to finalising a travel plan for submission.

## 8 Contents of a Travel Plan

### 8.1 Context

8.1.1 A travel plan is aimed at addressing the transport needs of a particular development or organisation and as such will be individual, using initiatives and measures particular to its own circumstances and requirements. However all travel plans will need to include some essential components, and this section sets out what elements will need to be included in order for the travel plan to be effective, as well as considering the particular stages of production of travel plans.

8.1.2 It is important that travel plans, where appropriate, are linked to Company / Organisation Environmental Policies and Corporate Social Responsibility where these exist. There is a clear link between travel plans and these wider aims and objectives set out by many organisations, which helps to strengthen and give weight to the travel plan process.

### 8.2 Essential Components of a Travel Plan

8.2.1 The following table sets out appropriate contents headings for all travel plans alongside an indication of what each heading section should encompass. An expanded version of this table is set out in Appendix 2. Reference should also be made to Table 6.2 in the Good Practice Guidelines.

Table 8.1 Essential Components of Travel Plan

Heading	Issues to cover
A. Background/ Context/ Site Assessment and Audit	Details of the site, its location, the intended use, number of staff and visitors, dwellings or pupils, existing site constraints and opportunities
B. Transport Impact	The travel requirements of the organisation/ development and what transport/ travel issues these will give rise to
C. Objectives/ Overall Strategy	What the plan is trying to achieve (e.g. to encourage access to the site by all sustainable means)
D. Measures/ Actions	What specific measures and actions will be introduced to help deliver the stated objectives ( <i>refer to section 9 below for a toolkit of possible measures to be considered</i> )
E. Targets, Time Frames, Remedial Measures and Potential Sanctions	Appropriate targets and timeframes against which the effectiveness of the measures/ actions to be taken will be reviewed/ monitored. Measures to be taken should targets not be met.
F. Responsibility, Ownership and Travel Plan Coordinator	Who is responsible (the owner) for delivering each stage of the TP and for implementing the proposed measures, actions and targets (e.g. by appointment of a travel plan co-ordinator/ travel plan Champion), and how this will be passed on/

	managed
G. Monitoring and Review	What arrangements will be put in place to review and monitor the plan and to assess whether the objectives are being met
H. Communication Strategy	How information on the plan, its progress, impacts benefits and success will be disseminated to influence all trips. Offer of incentives to travel sustainably.

8.2.2 All travel plans will include maps / plans showing the following where appropriate:

- pedestrian access to the site and nearby facilities
- the nearest bus station / routes including the location of bus stops
- nearest railway station including details of the local network
- taxis – ranks and phone numbers
- route of Leeds City Bus
- new and existing cycling links
- location of cycle parking facilities on site for staff / visitors / pupils / students / customers etc and nearby off site provision
- the location of shower and changing facilities provided for in the development
- the nearest car club parking bays
- motorcycle parking
- location of the car share bays
- internet link to public transport timetables

8.2.3 Where an existing operation is to relocate or expand, a survey of existing employee travel habits, and their anticipated future travel decisions to the new site, must be conducted before the relocation. The results should be used to inform and develop the most important actions and measures in the travel plan for the new development site. Travel plans for existing businesses should include a signed commitment to the delivery of the document.

8.2.4 A great many aids to travel planning can be found online and those resources appropriate to the site and development should be fully listed in the travel plan. A list is given in Section 11 of potential resources, although such links are subject to change with new resources coming on line all the time. The travel plan author should undertake their own research into the online resources available.

8.2.5 Successful travel plans avoid the use of ambiguous wording such as ‘should’, ‘explore’, ‘research’, ‘look into’, ‘will investigate’, ‘consider’ etc and focus on more definite commitments and positive wording.

8.2.6 The travel plan should not repeat unnecessary content from the transport assessment or include background issues and policy context that is not directly relevant or of use to the Travel Plan Coordinator (eg policy context,

trip generation tables, TRICs data etc). Internet links to key national and local resources will suffice. The document must be accessible, clear and concise, avoiding technical jargon. Lengthy appendices containing information subject to change such as bus timetables should be avoided. The focus must always be on the implementation rather than background and process.

- 8.2.7 All travel plans must provide the contact details of the Travel Plan Coordinator (TPC) if an existing business, or contact details for the person responsible for appointing the TPC. For multi-occupancy sites the travel plan should commit to the provision of a site wide TPC (contact details are required for the person responsible for the appointment). For larger or multi-occupancy sites there may be an overall site coordinator, company TPCs (for the larger occupiers), and travel plan representatives (for smaller occupiers). In addition Working or Steering Groups can successfully drive travel plan measures forward – these might include the site coordinators, developer / owner, LCC TravelWise, Metro, the Highways Agency etc and others if needed. The split of responsibility should be made clear in the submitted travel plan.
- 8.2.8 The TPC is a key part of any travel plan, and should be in post from the point where a development is first marketed. The TPC is required to contact the Leeds TravelWise Team on appointment and when work commences on delivering the travel plan. For many schemes the named TPC will change as the scheme is first marketed, then implemented and occupied through to a long term coordinator. Any change in contact details for the TPC must be passed to Leeds TravelWise.
- 8.2.9 An effective travel plan co-ordinator will have a budget available for offering incentives for travel by sustainable modes of travel. This could include provision of taster tickets for public transport use, offers of free hours use of the car club, funding for involvement in bike week, free use of the hire bikes at cyclepoint, holding competitions, or rewards for those that travel by sustainable modes of travel. The travel plan should commit to measures that the developer will fund on an annual basis, or set out an annual budget for the travel plan co-ordinator to use to fund incentives and events to encourage occupiers to change their travel habits. The budget needs to be sufficient to cover all the units. The travel plan should set out how much funding will be allocated for this, how it will be ring fenced for this use, and measures for potential increases to cover extra marketing and incentives should targets not be met.
- 8.2.10 A travel plan management strategy will specify how responsibility for delivery of the full travel plan will be handed from developer/land agent to the occupier. Any proposed / required travel plan measures that may require a separate planning obligation within a legal agreement such as Car Club funding or subsidised public transport ticketing must be agreed at the initial (outline) planning stage.
- 8.2.11 All travel plans must include a sample questionnaire or key headlines that would be used for the annual mode of travel survey. The process of designing a questionnaire, undertaking the survey and timeframes should be defined.



### 8.3 **Travel Plan Targets and Indicators**

8.3.1 The Planning Practice Guidance (DCLG 2014) sets out that travel plans *'should identify the specific required outcomes, targets, and measures, and set clear future monitoring and management arrangements all of which should be proportionate. They should also consider what additional measures may be required to offset unacceptable impacts if the targets should not be met.'*

8.3.2 Whilst the targets and indicators to be set for individual schemes / travel plans will relate to the circumstances of the individual scheme / premises they will need to be drawn up within the context of the targets and indicators in the West Yorkshire Local Transport Plan 3 (WYLTP2011) – see Appendix 1 for further details.

8.3.3 The key points in relation to the target setting process are:

- for new developments, outcome targets are best expressed in terms of maximum end levels of car use (this may also be further refined to include single occupancy car trips or for residential development the maximum number of children taken to school by car, alongside travel to work targets)
- the target maximum level of car use should be lower than would be expected of the development without a travel plan – i.e. any data collected on existing travel patterns should be improved on
- targets should be ambitious, but achievable at the same time
- it is important to distinguish between outcome targets and indicators (for example the level of bus use is a helpful indicator, but may not be an effective target since there is no reason to promote bus use at the expense of other sustainable modes).
- levels of parking proposed for the development should be consistent with chosen targets in the context of local parking standards

8.3.4 The setting of targets should be site and development specific but information that can be used to help assist in this process includes:

- trip generation databases such as TRICS
- if the development is an extension or rebuild, surveys of existing trips and mode split
- information about trips generated from similar types of development in the same area or experiences / data of that developer from other sites around the country – data pulled in from wider sources needs careful validation to ensure that it is comparable to the development proposed
- information about levels of car use and ownership in the area of development eg census data on journey to work and levels of car ownership
- data collected on a regular basis by the Council or other bodies such as Metro or the Highways Agency relating to traffic surveys (including mode splits), travel plan annual surveys etc
- advice from the Council's TravelWise team

- first principles approach looking at likely / maximum levels of staff and visitors, opening times / shift patterns, existing and potential alternative means of travel, parking restrictions etc
- use of trip generation restrictions for larger developments

8.3.5 Targets must cover all person trips generated by a development including retail / leisure customers, employees, visitors, pupils and students. The targets should relate the mode of travel used for the longest distance. All targets must be supplemented by a timetable for achieving the levels set out. It would normally be expected that all targets are met within three years of initial occupation. A commitment must be made to maintaining these levels or reducing them further in the future.

8.3.6 Targets derived at the planning application stage from a combination of sources represent a considered view based on empirical data and experience of the TP author and LCC Officers. In the majority of cases it is expected that such targets will be challenging but achievable. However the TP should allow for a review of the targets in light of initial survey results and comments received from users. It may be that the initial targets were too ambitious or not challenging enough, or that the wrong measures are being pursued. In these cases, and in discussion and agreement with LCC TravelWise after a full review of the TP progress, it may be appropriate to amend the targets.

#### 8.4 ***School Travel Plans***

8.4.1 The principles for producing travel plans set out in section 7.2 also apply to school travel plans, but there are a number of particular features and requirements unique to the school travel plan process

8.4.2 School travel plans must always be full travel plans and should be compiled with the assistance of LCC Travelwise Team. All travel plans submitted as part of a planning application should be included in the school development / implementation plan.

8.4.3 The site audit will be carried out with a member of the TravelWise team to identify barriers to sustainable travel in accordance with the Education Inspections Act 2006.

8.4.4 The Council's Sustainable Education Travel Coordinator has produced a set of guidance notes on school travel plan monitoring. These are available on the Council's Travel Plan website page or can be requested via the contact details in Section 11.

8.4.5 All pupil mode of travel data shown must include how pupils usually travel to, from school (when multiple modes are used the longest distance by any one mode should be indicated), and how they would like to travel to school. Pupils attending the school should play a major role in the development and implementation of the school travel plan, with community engagement where possible.

8.4.6 Monitoring of pupil mode of travel should be provided by an annual survey of all pupils. This data collected annually by each school must be shown by

number and percentage. This can be shown historically year on year but as a minimum the latest annual survey of all pupils data is to be provided.

- 8.4.7 Staff surveys should show how staff usually travel to work. The West Yorkshire Travel Plan Network survey (undertaken through iTrace) should be used where possible.
- 8.4.8 Any after school club or activity should be identified in the plan, with numbers of people attending, days and times of operation, and details of any community use.
- 8.4.9 Review of school travel plans must be undertaken annually, in accordance with Leeds CC monitoring schedule. Involvement of the head teacher and / or chair of governors is required

Table 8.2 Stages in the School Travel Plan Process

Stage	Activity	Responsibility
1. Set up travel plan Working Group	The group should include a member of the (schools) Senior Management Team together with School Governors, members of the PTA; pupils, parents representatives and other key stakeholders from the school community (as appropriate for the individual school)	School/ Leeds City Council school travel plan advisors
2. Appoint/ nominate 'School Champion(s)'	Nominate member(s) of Working Group to 'own'/ champion the travel plan and ensure that it is progressed	Headteacher/ Working Group
3. Meet with the designated School Travel Adviser	Set up a meeting at the School with the LCC School Travel Adviser	Headteacher/ Travel Plan Champion(s)/ LCC School Travel Adviser
4. (Pre-application) carry out site assessment / audit	Survey/ safety assessment of walking/ cycling/ vehicle routes to school and of on-site facilities. Identify requirements barriers and constraints, problems and opportunities	Headteacher/ Travel Plan Champion(s), assisted/ advised by LCC Transport Policy/ LCC Highway Services/ PFI/ BSF Project Team/ Estate Management
5. (Pre-application) prepare transport assessment/ or statement	To establish the transport impact (i.e. predict the likely number of total person trips to and from the school including staff and visitors)	School/ Leeds CC/ Developer
6. Audit of transport requirements of staff & pupils	Carry out a staff/ pupil travel survey/ census questionnaire to identify how staff/ pupils travel to and from school, how they would like to travel and what barriers/ constraints exist preventing preferred options	Headteacher/ Travel Plan Champion(s) with advice from LCC School Travel Adviser
7. Consultation with the school community	Consultation with parents pupils staff and other key stakeholders such as local residents to identify local concerns and issues	Headteacher/ Travel Plan Champion(s) with advice from LCC School Travel Adviser

8. (Pre-application) develop transport strategy / proposals	Consideration of appropriate objectives and measures capable of dealing with the identified travel impact, taking full account of existing constraints and opportunities; Setting of appropriate targets to achieve agreed objectives	Headteacher/ Travel Plan Working Group Champion(s)/ LCC School Travel Adviser
9. (Pre-application) prepare finalised travel plan	Draw up a package of measures to address travel impact and needs of school, and to meet objectives and targets	Headteacher/ Travel Plan Champion(s)/ School Travel Adviser
10. Submission of finalised school travel plan	Travel Plan approved by the LCC School Travel Adviser and LCC Children's Services and submitted alongside planning application	Headteacher/ Travel Plan Champion(s) and LCC Schools Travel Plan Adviser/ LCC Children's Services.
11. Approval granted	Secure approval for scheme; Secure approval for travel plan; Agreement to cover travel plan requirements and monitoring fee	LCC City Development and Children's Services / Developer
12. Implement travel plan	Travel plan measures put in place, including promotion and publicity measures. Inform LCC School Travel Adviser of commencement.	Headteacher/ Travel Plan Champion(s)
13. Monitoring and review	To monitor and review progress towards meeting chosen objectives and targets and to update travel plan to address changed circumstances and requirements (particularly if agreed targets are not met)	Headteacher/ Travel Plan Champion(s) assisted by School Travel Adviser (Use of annual survey of all pupils)

## 9 Toolkit of Travel Plan Measures

### 9.1 Context

9.1.1 A travel plan is a package of measures for a development or an organisation aimed at:

- managing its access provision and transport requirements
- reducing its travel impact on the locality and
- encouraging more sustainable travel solutions

9.1.2 There are a variety of measures that can be used to achieve these aims, and the purpose of this section is to provide a ‘toolkit’ of measures for possible use in a travel plan. The measures actually selected from the toolkit will vary depending on the particular circumstances of the development or use proposed, the requirements and travel patterns of the site users, and the constraints and opportunities offered by the site itself. Travel plans need to consider and include measures to influence the main trips to and from a site – eg student accommodation to the main place of study, or family housing to local schools. For family housing the travel plan coordinator should work with the local schools to encourage walking buses, cycling to school and ‘scoot to school’ initiatives. Schools can be contacted via the LCC School Travel Plan Advisers.

9.1.3 For these reasons, it is important to choose those measures which are appropriate to the individual circumstances / requirements of the proposed scheme, as clearly some may be more effective than others depending on the circumstances of the particular application. (Evidence will be required that all possible measures have been considered). Targeted local consultation may be of help in identifying measures which would or not be successful.

9.1.4 It is stressed that for the travel plan to be effective:

- the choice of measures should be chosen so as to work together as a single strategy aimed at delivering the travel plan objectives
- the site layout and facilities must be designed to encourage and facilitate the provision and use of the travel plan measures chosen
- that while certainty is required in what will be delivered in terms of measures at the planning application stage, that an element of flexibility and review process is incorporated into the TP

9.1.5 A travel plan is a dynamic document that must adapt to the needs of a site’s users. Travel plan measures determined and agreed at the planning application stage are based on empirical data, and author / Officer experience. However the plan should include a review mechanism whereby the TPC, in coordination and agreement with LCC TravelWise in light of survey responses, assesses what measures are working, what are not and what additional measures may be required to achieve the objectives.

9.1.6 All workplace travel plans must include reference to the West Yorkshire Travel Plan Network. The Travel Plan Network brings together Metro, the five local

authorities and the Highways Agency. It supports employers to promote more sustainable ways of travel to work. Membership is free.

9.1.7 A toolkit of measures suitable for different purposes and circumstances is given below. Full reference to documents and websites can be found in Section 11 (these websites should be included in full in the travel plan). It should be noted that some of the measures listed may require specific legal processes under Highways legislation (such as traffic regulation orders and traffic calming), and therefore the introduction of such measures, as promoted within a travel plan, cannot be guaranteed.

## 9.2 ***Measures to Reduce the Need To Travel***

- alternative working practices (e.g. flexitime, teleworking, homeworking, videoconferencing,
- local recruitment of staff
- local sourcing of raw materials/ produce
- compressed working week (e.g. 9 day fortnight)
- provision of on-site facilities (for shopping, eating, etc.)
- home delivery of products
- co-ordination of deliveries
- fleet management

## 9.3 ***Measures to Reduce Motorised Vehicles Usage and Impact***

- site layout and design to encourage and provide for sustainable options
- car parking restraint and management
- Car Park Management Plans – including information on how spaces will be allocated and details of charging
- introduction of (or use of existing) car clubs, including car club station/ parking spaces (in a visible and publicly accessible location) and free membership and trial usage for residents / staff
- promotion of car sharing for employees (by setting up a database for users, providing a guaranteed ride home in emergencies and offering priority marked up parking for car sharers prior to occupation, timing shift patterns to suit car sharing) (see [wycarshare.com](http://wycarshare.com) for more details) For travel to school car sharing is defined as adults / pupils who travel together in a car with someone who does not live at the same address
- guaranteed ride home in emergencies for all staff that travel sustainably
- use of pool bicycles
- use of pooled company cars, vans and taxis
- measures to encourage use of powered two wheelers

- offering financial incentives for/ not driving to work/ giving up parking space/ car sharing
- introduce on site car parking charges
- electric vehicle charging points (inc mobility scooters in sheltered secure location)
- use of electric / hybrid vehicles within car / commercial vehicle fleet
- use of biomethane vehicles – LCC has a biomethane refuelling station and can provide assistance and advice for organisations to help facilitate their own vehicle trials and business cases
- consideration of food miles and methods to reduce general wasted mileage
- grey fleet analysis (use of private cars for business use)
- provision of dedicated shuttle bus to serve the site
- managed pick up and drop off for end / start of term student accommodation

#### 9.4 ***Measures to Promote Public Transport***

- provision in site layout for public transport stops and public transport penetration of the site
- direct convenient and attractive pedestrian links to public transport entry points (ideally not more than 300m in length, 400m maximum from the origin point)
- pedestrian links to public transport stops to be more convenient and attractive than pedestrian links to car park
- provision of new bus stop infrastructure including shelters, raised kerbing, information displays and Real Time Information Displays (displays can also be included in prominent locations such as reception areas)
- provision of site specific public transport information (maps, leaflets, etc.)
- provision of free or discount ticketing (Corporate Metrocards, Residential Metrocards, Student Metrocards, etc.)
- promote public transport ticketing options

- provision (in conjunction with local operators) of new or enhanced public transport services to the site
- introduction of shuttle services to local public transport interchange, rail station or park & ride site facilities
- enhanced Public transport waiting facilities integrated with development (e.g. bus “lounges” in reception areas/ lobbies incorporating real time information)
- promotion of public transport websites such as ‘your nextbus’ and A to B journey planner, personalised journey planner, Yellow Bus school buses (‘My Bus’)
- dissemination of Metro (WYCA) public transport promotion and assistance initiatives
- promote links to nearest railway station / public transport interchange
- arrange shift patterns to meet public transport operation times

### 9.5 ***Measures to Promote Walking***

- provision of direct, convenient and attractive (including security , landscaping, gradient etc) pedestrian routes to local facilities, including dropped kerbs at key locations (ideally more convenient to use than route by car)
- improvements to local walking network and in particular strategic routes such as the canal towpath
- site layout to be designed to maximise and encourage walking options
- introduction of 20mph Home Zones and traffic calming measures
- information provided on health benefits of walking
- advice on personal safety (including free attack alarms)
- promotion of health benefits of walking (and cycling)
- working with local educational establishments

9.5.1 Significant information on promoting walking can be found at [www.walkit.com](http://www.walkit.com)

### 9.6 ***Measures to Promote Cycling***

- signing up to the Cycle to Work Guarantee ([www.cycletoworkguarantee.org.uk](http://www.cycletoworkguarantee.org.uk))
- site layout designed to maximise and encourage opportunities to cycle
- provision of convenient, segregated cycle paths to link to local cycle network (safe routes to school, to work, etc.)
- improvements to local walking network and in particular strategic routes such as the canal towpath
- contributions to the improvement of the local cycle network
- provision of secure, undercover and adequate cycle parking facilities in convenient location (see UDP for guidance on numbers). The starting



point for cycle parking should be within building curtilages or individual lockers

- provision of a 'spares and tools' box for unexpected repairs for cyclists
- introduction of traffic calming measures and 20mph Home Zones
- provision of changing/ shower facilities drying rooms and cycle locker facilities at workplaces
- introduction of financial incentives (e.g. mileage allowance for work use and government Cycle to Work tax saving scheme)
- dissemination of DfT/ LCC cycling promotion and assistance initiatives (e.g. Bike Buddies/ local cycle network information)
- promotion of local cycle maps and journey planners including [www.transportdirect.info](http://www.transportdirect.info)
- commitment to provide additional cycle parking if the demand arises

#### **9.7 Measures to Promote / Market Travel Plan**

- marketing to be positive and prominent part of sites promotion
- marketing aimed persuading switch to sustainable modes and ensuring targets are met
- marketing measures to commence as early as possible e.g. with sales literature and advertising or prior to commencement of any relocation (and to cover all travel and all modes to and from the site)
- travel plan measures included in organisation's own marketing material (e.g. welcome packs at residential sites, employment packs at the workplace, newsletters, sales details and staff inductions, noticeboards, leaflet drops etc.)
- company / site website to include travel information by all modes on website (if multiple businesses occupy the development each one can provide a link on their website to the travel directions on the site wide development website)
- specific promotion of any subsidised TP measure such as car clubs or public transport ticketing
- introduction of development newsletter, website (inter and/or intranet), or internet forum to promote and market travel plan measures
- prioritise sustainable travel information above car travel directions

- joint incentives with other local organisations/ community groups to promote the wider community, economic and health benefits of travel plan measures.
- use leaflets and posters from Metro (WYCA) and LCC TravelWise
- setting up of a local Travel Plan Forum
- active participation in the West Yorkshire Travel Plan Network
- personalised travel planning
- promote links to Corporate Social Responsibility plan

## 9.8 ***Additional Measures for Travel to School and School Travel Plans***

9.8.1 The lists above contain many measures that could be incorporated into a school travel plan or travel plan influencing travel to school, but more specific measures include (further details on these measures can be found in Section 11):

- walking buses
- cycle training for children
- 'Walk on Wednesdays'
- Safer Routes to School scheme (also relevant for other developments e.g. colleges, community facilities, shops etc)
- Walk to School Week / Bike Week
- Scoot to School
- sustainable travel lesson plans
- GenerationM website
- Safemark
- junior road safety officers
- cycle or scooter storage
- measures and incentives to discourage parents from driving their children to school
- the provision of school buses if walk distances within the catchment, or from the development to the nearest schools, are too long
- adjustment to speed limits
- pedestrian training for children
- independent travel training

## 10 Approval, Securing, Monitoring and Review of Travel Plans

### 10.1 Context

10.1.1 The travel plan is a key element in defining what is the travel impact of a scheme and how it will be accommodated and addressed in the particular site circumstances of a development scheme. When approving a travel plan the Council needs to be satisfied that it will effectively deliver the required outcomes. Also, if it is not implemented as agreed and travel plan targets are not met, the approved development can give rise to serious adverse effects to the detriment of the local community and the occupiers themselves.

10.1.2 It is essential therefore that:

- The content of the travel plan is fully assessed prior to its approval
- The measures and targets included in the travel plan are secured for implementation by mutual agreement of the Council and the developer/ applicant (normally by means of a s106 Legal Agreement)
- The outputs of the travel plan (normally trip levels and mode split) are annually monitored against the agreed targets and objectives
- The travel plan is reviewed annually to assess whether it is delivering its anticipated outputs or whether it has failed to meet its targets and if the latter what mitigation/ alternative measures need to be put in place to address the travel impact/ requirements of the scheme

### 10.2 Assessment of Travel Plans

10.2.1 It is critical to assess the proposed travel plan prior to its agreement. All travel plans should meet the TRACES assessment criteria as summarised in Table 10.1.

Table 10.1 Travel Plan Assessment Criteria

T	Transparent	Plans will identify clearly which organisations are responsible for all elements of the plan, where the financing will come from, and how targets have been developed
R	Realistic	Plans should set realistic but stretching targets, which reflect Local Development Framework and Local Transport Plan policies and the likely make-up of new occupiers/ inhabitants. Targets should be SMART (Specific, Measurable, Achievable, Realistic and Time related) and should relate to the particular circumstances of the site. They should also take account of previous experience of people adopting sustainable transport choices (e.g. in response to travel plans and personalised journey planning).
A	Achievable	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.
C	Committed	Plans need clear commitment to their establishment from the developer for the period of their implementation/ lifetime of the development. This can be demonstrated, for example, by the appointment of a travel plan coordinator and the setting aside of funding to take the plan forward.

E	Enforceable	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.
S	Sustainable	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 the developer to occupiers, residents or other organisations and continuing sources of funding for the plan.

10.2.2 This assessment will be carried out by the Council prior to the travel plan being put forward for planning approval.

### 10.3 **Monitoring and Review of the Travel Plan**

10.3.1 Once implemented, it is essential that the travel plan be monitored in order to assess its effectiveness and to identify any failure to deliver agreed measures or to achieve agreed targets.

10.3.2 Targets will normally be trip and mode related (i.e. no. of single occupancy trips by car) and the applicant / occupier will be responsible for recording the number of trips to and from the site by means of:

- (as a minimum) an annual 'snapshot' modal split survey of employees, occupiers, pupils, residents and/ or visitors, plus supplemented by the following where appropriate;
- a full staff/ occupier/ resident travel survey questionnaire every three years. Surveys must be conducted at the same time each year for consistency, or
- regular traffic counts of vehicles coming to and from the site, including cycles and pedestrians as well as motorised vehicles.

10.3.3 This information could be further supplemented by the use of Travel Diaries, uptake of public transport or other alternative modes, use of parking spaces, use of cycle parking, and any issues of problem / overspill parking.

10.3.4 A key aim of any monitoring must be to achieve high response rates that give a representative view of travel habits. The minimum response rate should be set in the travel plan.

10.3.5 The travel plan will also need to state when monitoring will take place (normally within three months of occupation and thereafter annually). The outcomes of these surveys will be reported in writing by the Travel Plan Coordinator to the Council at a mutually agreed date after the monitoring has been completed (normally within three months). The TPC must submit an annual report with survey information, annual action plans, progress reports and any proposed changes to the travel plan. Action plans are to include tasks involved, persons responsible and dates by which measures will be implemented.

10.3.6 Travel plans should be dynamic documents with inbuilt flexibility. As part of the annual review, not only should progress be assessed against the agreed targets, but also against success or otherwise of measures and possible need

to change, and whether the targets themselves are appropriate in light of survey results. Any change to the travel plan must first be agreed in writing with the LCC TravelWise team.

10.3.7 Leeds City Council TravelWise team use the 'iTrace' travel plan management software. It provides a centralised software suite designed to monitor and report on the performance of travel plans, offering quicker, easier travel planning, assessment, auditing and forecasting. The TPC will be responsible for keeping any iTrace pages for the development up-to-date, including the provision of survey data.

#### 10.4 ***Travel Plan Review Fee***

10.4.1 The Council is responsible for evaluating the effectiveness of all development related travel plans, and monitoring travel activity against agreed targets in approved travel plan(s). The Council will charge for this review service.

10.4.2 Charges will be £500 per annum for up to 100 employees / 100 residential units then increasing at the rate of £1.00 per employee/ or residential unit to a maximum of £4,000 per annum. This review fee will be subject to periodical review.

10.4.3 The fee shall be paid up front prior to implementation of the travel plan to cover a period of five years (a minimum of £2,500 and maximum of £20,000) – the Council's TravelWise team will continue to work with occupiers and travel plan coordinators after this five year period. This charge will be in addition to the standard s106 administration charge applied, and will be subject to review. In certain circumstances, it may also be appropriate to use a mutually agreed independent monitoring agency, the costs of which shall be met by the applicant / developer. This approach will be particularly appropriate when financial payments or mitigating measures are dependant on the outcomes.

10.4.4 All development exceeding the thresholds set out in section 5.2 and requiring a travel plan are liable for the appropriate review fee.

10.4.5 Using the travel plan review fee, the Leeds TravelWise team will work with the appointed Travel Plan Coordinator to support the delivery of the travel plan, providing advice and information. The fee will also support the use of 'iTrace' in the survey and monitoring process. When the results of the monitoring surveys are received the TravelWise team will discuss the results of the survey with the TPC, comparing the data to the travel plan targets, and looking at the survey response rates. The survey data will indicate where further measures may be required, or further marketing and promotion work required.

10.4.6 In addition, the review fee will be used by the Council to provide the following travel plan services:

- host and run an annual snapshot travel to work survey which is suitable for compliance with standard annual monitoring requirements at developments

- review and evaluate annual travel plan update reports submitted by development travel plan coordinators to ensure compliance with Planning obligations and travel plan targets
- provide advice to travel plan coordinators in respect of measures, initiatives, campaigns and other opportunities that may be necessary to comply with travel plan targets and avoid enforcement action
- maintain a live database record of development travel plan Planning activity (iTrace) including, site details, measures, actions, site audits, targets and survey results etc

10.4.7 Appendix 1 sets out how this SPD and requirement for a Review Fee complies with the Community Infrastructure Levy regulations 2010.

## 10.5 ***Review of the Travel Plan***

10.5.1 The travel plan should incorporate agreed dates for the Council to carry out a review / assessment of the plan to assess to what extent it has achieved its agreed objectives and targets. Such reviews will normally be carried out annually after the first occupation date of the scheme.

10.5.2 If as a result of the review it is found that targets are not being met the applicant will be required to either:

- carry out the appropriate remedial measures as defined in the s106 Legal Agreement or
- if circumstances have changed, or progress towards meeting objectives is slower than originally anticipated then revised timescales and targets for the travel plan can be drawn up subject to the agreement of the Council.

10.5.3 If remedial measures are required then additional monitoring may be required to assess the impact of these.

## 10.6 ***Securing the Travel Plan***

10.6.1 For the majority of applications the agreed measures and targets specified in the travel plan will be secured by means of a s106 legal agreement between the applicant / developer and the Council. In some straightforward cases, it may be appropriate to secure the implementation of the travel plan by means of condition, but wherever limitations/ targets are applied, or specific one-off financial contributions are required or there are significant ongoing financial commitments or sanctions or commitments involving third parties such as Metro, (i.e. the majority of travel plans) a s106 Legal Agreement (or unilateral undertaking) will be required.

10.6.2 S106 Agreements are an essential means of securing an agreed travel plan, and in addition to specifying the agreed measures and targets they will also include specific sanctions to ensure that any failure to deliver agreed measures and/ or outcomes can be remedied. These sanctions should not be regarded as a penalty but as means of addressing the travel impact of the scheme to the benefit of all parties.

10.6.3 These sanctions can take a number of forms:

- further marketing and other 'soft' measures

- payments to the local authority (or use of a Bond deposited with the Authority) to implement previously agreed measures to help meet the targets set out in the travel plan
- specified works that are expected to remedy the failure to achieve agreed outcomes e.g. reduction of car parking spaces
- specified payment to the local authority (or use of a Bond deposited with the Authority) to meet the cost of taking action to achieve the agreed outcome e.g. the implementation of a car parking zone around the development, and/ or
- specified change in the way the site / development is used / phased in order to achieve previously agreed outcomes e.g. the prevention of occupation / construction of part of the development until a specified element of the travel plan has been implemented as agreed.

10.6.4 As sites, developments, and their travel needs vary considerably their travel plan targets, sanctions and remedial measures will also differ. Therefore a 'one size fits all' approach cannot be set out in this SPD.

10.6.5 Any financial sanction would be specified as an amount within the s106 or a formula provided based on the monitoring and targets – i.e. the higher the level over the agreed targets the higher the remedial fee. Any such financial sanction must be spent on measures relating to sustainable travel directly impacting upon the development site. In order to be monitored and enforced, if necessary, sanctions will have to be clearly set out in the travel plan and associated s106. It is not intended that such sanctions would be open ended financial risks or run in perpetuity, but rather be linked to an agreed set of remedial measures or a formula based approach with defined monitoring and review periods (typically five to 10 years or linked to build out).

10.6.6 Obligations to deliver the travel plan/s will pass on to all occupiers through sales / lease agreements and the relevant s106 agreement – this does not apply to individual residential units within a development. This should be set out in the travel plan.

10.6.7 Appendix 3 of this document sets out illustrative planning obligations and conditions within a local context. The planning obligations should set out in clear terms:

- The overall outcomes to be achieved by the travel plan
- The indicators and targets
- Measures to be implemented the process by which such indicators and related targets, and any other measures are to be determined, if not already set out in the travel plan
- The process for the monitoring and review of the travel plan
- Any sanctions where the targets are not being met, and how and when they will be imposed
- Any procedure for the variation of such targets and / or indicators, or other measures
- The person(s) or organisation that will be responsible for the management of the plan (the Travel Plan Co-ordinator)

## 10.7 *Failure to Reach Agreement on a Travel Plan*

10.7.1 The weight to be given to a travel plan in a planning decision will be influenced by the extent to which it materially affects the acceptability of the development proposed and the degree to which it can be legally secured. If the transport issues for a particular development are such that if they are not addressed by the transport assessment or travel plan, the proposal could aggravate existing congestion or public transport capacity problems, resulting in severe impacts. The application should be considered for refusal on grounds similar to those set out below:

**The proposal has failed to provide the required commitments and measures in its submitted Travel Plan which are considered necessary to address the issues identified in the Transport Assessment (or Statement), such that existing traffic congestion and public transport service and capacity problems in the vicinity of the site will be aggravated resulting in severe impacts and the sustainability requirements of the NPPF and the policy requirement of Core Strategy policy T2 (as amplified in the Travel Plan SPD) will not be met.**



# 11 Further Information

## 11.1 Websites

### General

West Yorkshire Travel Plan Network  
[www.wytravelplan.com](http://www.wytravelplan.com)

Leeds Travel Info,  
[www.leedstravel.info/cdmf-webserver/jsp/leeds.jsp](http://www.leedstravel.info/cdmf-webserver/jsp/leeds.jsp)

Leeds Sustainable Travel Information  
[www.leeds.gov.uk/residents/Pages/SustainableTravel.aspx](http://www.leeds.gov.uk/residents/Pages/SustainableTravel.aspx)

Green Fleet best practice guide  
[www.energysavingtrust.org.uk/businesses/content/transport](http://www.energysavingtrust.org.uk/businesses/content/transport)

Blue Badge Scheme  
[www.leeds.gov.uk/residents/Pages/Blue-badge-parking.aspx](http://www.leeds.gov.uk/residents/Pages/Blue-badge-parking.aspx)

DfT Essential Guide to Travel Planning  
[webarchive.nationalarchives.gov.uk/20120214193844/http://dft.gov.uk/pgr/sustainable/travelplans/work/essentialguide.pdf](http://webarchive.nationalarchives.gov.uk/20120214193844/http://dft.gov.uk/pgr/sustainable/travelplans/work/essentialguide.pdf)

Sustainable Tourism advice  
[www.green-business.co.uk/index.asp](http://www.green-business.co.uk/index.asp)

### Public Transport

Free public transport journey planners  
[www.metrojourneyplanner.info/welcome.do](http://www.metrojourneyplanner.info/welcome.do)

[www.yorkshiretravel.net/welcome.do](http://www.yorkshiretravel.net/welcome.do)

your next bus, real time bus information  
[www.wymetro.com/ynb/](http://www.wymetro.com/ynb/)

Public transport information: bus and train timetables and ticketing information,  
[www.wymetro.com](http://www.wymetro.com) or on tel 0113 2457676

[www.wymetro.com/TicketsAndPasses/](http://www.wymetro.com/TicketsAndPasses/)

Access Bus  
[www.wymetro.com/BusTravel/accessrural/AccessBus.htm](http://www.wymetro.com/BusTravel/accessrural/AccessBus.htm)

Bus passes  
[www.leeds.gov.uk/residents/Pages/Disabled-Persons-Bus-Pass.aspx](http://www.leeds.gov.uk/residents/Pages/Disabled-Persons-Bus-Pass.aspx)

National train travel and real time train information  
[www.nationalrail.co.uk](http://www.nationalrail.co.uk)

Coach information

[www.nationalexpress.com](http://www.nationalexpress.com) and [www.megabus.com/](http://www.megabus.com/)

Corporate MCard Annual Pass scheme for staff

[www.wytravelplan.com/guide/benefits](http://www.wytravelplan.com/guide/benefits)

Residential MetroCards

[www.wymetro.com/TicketsAndPasses/moresavings/residential.htm](http://www.wymetro.com/TicketsAndPasses/moresavings/residential.htm)

The Student MetroCard

[www.wymetro.com/TicketsAndPasses/YoungPeople/StudentPlusMetroCard.htm](http://www.wymetro.com/TicketsAndPasses/YoungPeople/StudentPlusMetroCard.htm)

The Leeds University nightbus

[www.leedsuniversityunion.org.uk/helpandadvice/healthandwellbeing/gethomesafe/](http://www.leedsuniversityunion.org.uk/helpandadvice/healthandwellbeing/gethomesafe/)

Free public transport timetable ordering service

<http://www.wymetro.com/contactmetro/orders/>

Useful Public Transport Apps

[www.wymetro.com/Useful\\_Travel\\_Apps/](http://www.wymetro.com/Useful_Travel_Apps/)

MCard

[www.m-card.co.uk](http://www.m-card.co.uk)

Park & Ride

[www.wymetro.com/park-and-ride/](http://www.wymetro.com/park-and-ride/)

## **Walking**

walking journey planner

[www.walkit.com/cities/leeds](http://www.walkit.com/cities/leeds)

City centre walking maps

[www.leeds.gov.uk/residents/Pages/walkitleeds.aspx](http://www.leeds.gov.uk/residents/Pages/walkitleeds.aspx)

## **Cycling**

Cycle maps and information

[www.leeds.gov.uk/cyclemaps](http://www.leeds.gov.uk/cyclemaps) (*documents button*)

Free Adult Cycle Training

[www.wygocycling.com](http://www.wygocycling.com)

cycle journey planner

[www.cyclestreets.net](http://www.cyclestreets.net)

Cycle to Work scheme

[www.dft.gov.uk/publications/cycle-to-work-scheme-guidance/](http://www.dft.gov.uk/publications/cycle-to-work-scheme-guidance/)

Business cycle

<http://businesscycle.org.uk/>

city connect Leeds Bradford cycle upgrade  
[www.cyclecityconnect.co.uk](http://www.cyclecityconnect.co.uk)

Utravel Active University Bike Hire  
[www.leeds.ac.uk/velocampus](http://www.leeds.ac.uk/velocampus)

Leeds rail station bike hire  
[www.bikeandgo.co.uk](http://www.bikeandgo.co.uk)

Leeds cyclepoint  
[www.northernrail.org/travel/cycling/cyclepoint](http://www.northernrail.org/travel/cycling/cyclepoint)

[Go Getter Despatch](http://gogetterdespatch.co.uk)  
<http://gogetterdespatch.co.uk>

[Last Mile Leeds](http://www.lastmileleeds.co.uk)  
[www.lastmileleeds.co.uk](http://www.lastmileleeds.co.uk)

### **Car Sharing**

West Yorkshire scheme car share  
[www.wycarshare.com](http://www.wycarshare.com)

### **Powered Two Wheelers**

[www.geton.co.uk/](http://www.geton.co.uk/)  
[www.direct.gov.uk/en/Motoring/LearnerAndNewDrivers/RidingMotorcyclesAndMopeds/DG\\_4022666](http://www.direct.gov.uk/en/Motoring/LearnerAndNewDrivers/RidingMotorcyclesAndMopeds/DG_4022666)  
[www.begin-motorcycling.co.uk/](http://www.begin-motorcycling.co.uk/)

### **Students**

University transport pages  
[www.leedsbeckett.ac.uk/studenthub/travel-and-transport.htm](http://www.leedsbeckett.ac.uk/studenthub/travel-and-transport.htm)  
[www.leeds.ac.uk/velocampus/downloads/TravelGuide2013.pdf](http://www.leeds.ac.uk/velocampus/downloads/TravelGuide2013.pdf)  
[www.leedstrinity.ac.uk/aboutus/findus/Pages/default.aspx](http://www.leedstrinity.ac.uk/aboutus/findus/Pages/default.aspx)

### **School Travel**

LCC school travel plan website (inc Walking Bus pack and Scoot to School scheme)  
[www.leeds.gov.uk/residents/Pages/schooltravelplans.aspx](http://www.leeds.gov.uk/residents/Pages/schooltravelplans.aspx)

walking buses  
<http://webarchive.nationalarchives.gov.uk/20111006043257/dft.gov.uk/pgr/sustainable/schooltravel/howtsetupawalkingbus.html>

cycle training for children  
[www.leeds.gov.uk/roadsafety](http://www.leeds.gov.uk/roadsafety)

'Walk on Wednesdays'  
[www.livingstreets.org.uk/walk-with-us/walk-to-school](http://www.livingstreets.org.uk/walk-with-us/walk-to-school)

Safer Routes to School scheme  
[www.sustrans.org.uk/what-we-do/safe-routes-to-schools](http://www.sustrans.org.uk/what-we-do/safe-routes-to-schools)

GenerationM website  
[www.generationm.co.uk](http://www.generationm.co.uk)

School travel  
[www.wymetro.com/BusTravel/SchoolTransport/](http://www.wymetro.com/BusTravel/SchoolTransport/)

junior road safety officers  
[www.jrso.com/](http://www.jrso.com/)

### **Car Clubs**

Leeds City Council car club provider  
[www.citycarclub.co.uk](http://www.citycarclub.co.uk)

### **Social Media**

Twitter [@LeedsTravelWise](https://twitter.com/LeedsTravelWise)  
Facebook [Cycling in Leeds](https://www.facebook.com/CyclinginLeeds)

## **11.2 *Contacts***

Leeds City Council TravelWise team  
[travelwise@leeds.gov.uk](mailto:travelwise@leeds.gov.uk) or 0113 395 0276

School Travel Plans: 0113 247 5762

Development Enquiry Centre: 0113 222 4409

West Yorkshire Combined Authority (Metro) (Development & Travel Planning): 0113 348 1718

## 12 Glossary

AAP	Area Action Plans
BSF	Building School for the Future
CIL	Community Infrastructure Levy
DaSTS	Delivering a Sustainable Transport System
DCLG	Department of Communities and Local Government
DCSF	Department for Children, Schools and Families
DETR	Department of the Environment, Transport and the Regions
DfES	Department for Education and Science
DfT	Department for Transport
DTLR	Department of Transport, Local Government and the Regions
EIA	Education Inspection Act (2006)
GPG	Good Practice Guidelines (Delivering Travel Plans through the Planning Process)
GMC	Greater Manchester Council
HA	Highways Agency
LA	Local Authority
LCC	Leeds City Council
LDF	Local Development Framework
LHA	Local Highway Authority
LPA	Local Planning Authority
LTP	Local Transport Plan
Metro	Bus and rail
ODPM	Office of the Deputy Prime Minister
PFI	Private Finance Initiative
PPG	Planning Practice Guidance
PTA	Parent Teacher Association
S106	Section 106 Legal Agreements (under 1990 Town & Country Planning Act)
SPD	Supplementary Planning Document
SRN	Strategic Road Network
TA	Transport Assessment
TiF	Tax Incremental Funding
TP	Travel Plan
TPC	Travel Plan Coordinator
TRACES	Transparent, Realistic, Achievable, Committed, Enforceable, Sustainable (review criteria)
TS	Transport Statement
TRICS	Trip Rate Computer Information System
UDP	Unitary Development Plan
WYLTP	West Yorkshire Local Transport Plan
WYCA	West Yorkshire Combined Authority

## 13 References

CIL (2010) Community Infrastructure Levy Regulations 2010, Statutory Instruments 2010 No.948

DCLG / DfT (2007) Guidance on Transport Assessment, Department for Transport & Department for Communities and Local Government

DCLG / DfT (2009) Good Practice Guidelines: Delivering Travel Plans through the Planning Process, Department for Transport & Department for Communities and Local Government

DCLG (2014) Planning Practice Guidance,  
<http://planningguidance.planningportal.gov.uk/>

LCC (2006) The Leeds Unitary Development Plan Review, Leeds City Council

LCC (2014) The adopted Leeds Core, Leeds City Council

WYLTP3 (2011) West Yorkshire Local Transport Plan 2011 – 2026: My Journey Connecting People and Places, Metro and West Yorkshire Local Transport Plan Partnership

## Appendix 1 – National and Regional Policy Context

### 13.1 *National policy*

- 13.1.1 The White Paper “Creating Growth, Cutting Carbon: Making Sustainable Local Transport Happen” (DfT 2011), sets out the Government’s vision for “*a transport system that is an engine for economic growth, but one that is also greener and safer and improves the quality of life in our communities.*”
- 13.1.2 The White Paper recognises that two-thirds of all journeys are less than five miles and could easily be undertaken by sustainable modes and focuses on offering people choices that will deliver that shift in behaviour. In enabling sustainable transport choices the document lists travel planning as one of the key mechanisms in packages of measures developed from the bottom up rather than top down.
- 13.1.3 The National Planning Policy Framework document published in March 2012 sets out in para 36 that  
*“A key tool to facilitate this (refers to previous paragraph on sustainable travel modes) will be a Travel Plan. All developments which generate significant amounts of movement, should be required to produce a Travel Plan.”*

13.1.4 The online Planning Practice Guidance (March 2014) provides further clarity on the travel plan requirements set out in the NPPF and supports the more detailed principles set out in the 2009 Good Practice Guidelines. The guidance sets out the importance of travel planning and the positive contributions to sustainable travel; lessening traffic generation; reducing carbon emissions; creating accessible, connected communities; improving health outcomes and quality of life; improving road safety; and reducing the need for new development to increase road capacity or provide new roads.

*'The Transport Assessment or Transport Statement may propose mitigation measures where these are necessary to avoid unacceptable or "severe" impacts. Travel Plans can play an effective role in taking forward those mitigation measures which relate to on-going occupation and operation of the development (PPG 2014)*

13.1.5 The DfT's Circular 2/2013 Strategic road network and the delivery of sustainable development sets out how the Highways Agency will work in partnership with regional and local planning and transport authorities, public transport providers and developers to participate in all stages of the planning process to produce sound and deliverable strategies to ensure that developments are, in transport terms, as sustainable as possible. This includes *'impact minimisation through realistic travel plans.'* The document reflects the importance of travel planning to the Highways Agency in limiting the impact of new development on their network..

13.1.6 Guidance for Local Transport Plans (DfT 2009), Annex E lists travel planning as one of the key measures for meeting LTP3 goals covering all five Delivering a Sustainable Transport System (DaSTS) goals which are:

- to support national economic competitiveness and growth, by delivering reliable and efficient transport networks
- to reduce transport's emissions of carbon dioxide and other greenhouse gases, with the desired outcome of tackling climate change
- to contribute to better safety, security and health and longer life expectancy by reducing the risk of death, injury or illness arising from transport, and by promoting travel modes that are beneficial to health
- to promote greater equality of opportunity for all citizens, with the desired outcome of achieving a fairer society
- to improve quality of life for transport users and non-transport users, and to promote a healthy natural environment



13.1.7 Delivering Sustainable Low Carbon Travel: An Essential Guide for Local Authorities (DfT 2009) states that *“sustainable travel initiatives have the potential to add real value to the next round of Local Transport Plans (LTP).”*

13.1.8 The guide seeks to complement the statutory LTP Guidance by providing support for developing a sustainable travel business case based on the latest evidence and good practice from around the country. It places travel planning at the heart of such initiatives drawing on the positive results of the Sustainable Travel Demonstration Towns and Cycling Demonstration Towns. It goes on to state that:

*“Sustainable travel is about understanding your local area and providing for its transport needs through a package of measures which promote attractive sustainable transport alternatives such as walking, cycling, public transport and sustainable car use, held together by a clear brand. The sustainable travel approach rests on three pillars:*

- *creating positive choices for travellers;*
- *a holistic package of measures, which ‘lock-in’ the benefits; and*
- *local application tailored to local circumstances.”*

13.1.9 The DfT and DCLG issued the Good Practice Guidelines: Delivering Travel Plans through the Planning Process’ in 2009. This comprehensive document covered all aspects of travel planning and brought together some of the best of current practice from around the country. This document was cancelled and superseded by the Planning Practice Guidance in 2014, but still contains good practical advice on the content and implementation of effective travel plans.

13.1.10 A Best Practice Model Supplementary Planning Document has been issued (GMC 2006) on which this SPD for Leeds has been based.

13.1.11 The Education Inspections Act (EIA) 2006 section 508A places a statutory duty upon local authorities to promote sustainable travel to and from school. The guidance which accompanies the EIA “recognises the important role that travel plans can play in raising awareness of young people and staff about the consequences of their transport choices and the benefits of choosing sustainable alternatives.

## 13.2 **CIL regulations**

13.2.1 The CIL Regulations require that s106 obligations comply with three key tests. In order to be lawful a s106 must be:

- (a) necessary to make the development acceptable in planning terms;
- (b) directly related to the development; and
- (c) fairly and reasonably related in scale and kind to the development.

13.2.2 The policy background requires that travel plans are produced for development of a certain size. This SPD and the Planning Practice Guidelines set out what should be included within a successful travel plan. For the majority of sites that will require a travel plan under the revised SPD, there will be measures within that travel plan, such as Metrocards, Car Club,

targets and sanctions etc that can only be secured via separate obligations within a s106.

13.2.3 Travel plans are by definition directly related to the development in question – no two travel plans should be the same and all successful plans are tailored to the site location and uses proposed. The benefits of travel plans are applicable to both developers / site owners and those staff/visitors/students etc coming to the site.

13.2.4 The SPD sets out thresholds for travel plans. These are generally based on the number of trips a site will generate and what is considered to be a 'significant generator of travel.' The travel plan measures applied to a site will generally get more numerous / costly the larger it gets or less sustainable the location.

13.2.5 In general, therefore, it is considered that securing travel plans and the measures contained via s106 agreements within is fully compliant with the 2010 CIL regulations. It is accepted that this position would need to be reviewed on an application by application basis as no two developments are the same.

### 13.3 **Regional Policy**

13.3.1 The West Yorkshire Local Transport Plan entitled 'My Journey' published in March 2011 covers the period 2011 to 2026. The Plan has three key objectives

- Economy – to support economic activity and growth in the region
- Low Carbon – to make progress towards a low carbon sustainable transport system
- Quality of Life – to enhance the quality of life of people living, working and visiting the region

13.3.2 The Plan looks for 'Triple Win' proposals that help to achieve all three objectives. Successful travel planning clearly has a role in this. The Strategic Proposals within the Plan are categorised into four themes, Travel Choices and Connectivity being two of those where travel plans are listed as key mechanisms for successful implementation of the LTP.

13.3.3 Within LTP3 travel plans will directly help contribute to:

- Strategic Proposals 6 to 12
- Connectivity Proposal 22
- Indicators 1, 4, 6, 7 and 9

## Appendix 2 - Essential Components of a Travel Plan

Heading	Issues to cover	Steps to be taken	√	Date
A. Background/ Context/ Site Assessment and Audit	Details of the site, its location, the intended use, number of staff, dwellings or pupils, existing site constraints and opportunities	1 – Survey site characteristics		
		2 – Plot existing Highway network		
		3 – Record existing Public Transport provision		
		4 – Estimate proposed floorspace		
		5 – Estimate no. of employees, residents, visitors, etc( and record any existing travel patterns if an extension)		
		6 – Identify transport constraints (congested roads, lack of public transport)		
		7 – Identify transport opportunities (new pedestrian, cycle or public transport links)		
B. Transport Impact	The travel requirements of the organisation/ development, the number of trips it will generate and what transport/ travel issues these will give rise to	8 – Identify proposed land uses		
		9 – Identify any particular transport requirements of proposed development		
		10 – Estimate the likely no. of <u>person</u> trips it will generate using appropriate data sources (eg Trip generation data bases, census data, existing site surveys, comparative sites) – only required if part of monitoring regime]		
		11 – Consider how these trips will be accommodated on the site and on the adjacent highway, public transport and cycle network		
		12 – Identify the transport problems/ issues that need to be addressed		
C. Objectives/ Overall Strategy	What the plan is trying to achieve (e.g. to encourage access to the site by all sustainable means)	13 – Set out the objectives of the Travel Plan <i>e.g. - reduce car usage to &amp; from the site</i> <i>- encourage car sharing</i> <i>- encourage use of sustainable modes (public transport, walking and cycling)</i> <i>- rationalise/ reduce delivery movements</i> <i>- reduce need for car parking</i> <i>- maximise site potential</i> <i>- achieve sustainable development</i>		

Heading	Issues to cover	Steps to be taken	√	Date
D. Measures/ Actions	What specific measures and actions will be introduced to help deliver the stated objectives ( <b>refer to section 9 for a toolkit of possible measures to be considered</b> )	14 – Draw up site design brief to accommodate proposed Transport Strategy		
		15 – Consider what measures can be adopted to reduce need to travel		
		16 – Consider what measures can be introduced to encourage public transport		
		17 - Consider what measures can be introduced to encourage other sustainable modes		
E. Targets, Time Frames, Remedial Measures & Potential Sanctions	Appropriate targets and time frames against which the effectiveness of the measures/ actions to be taken will be reviewed/ monitored. Measures to be taken should targets not be met	18 – Set targets for proportion of occupiers, visitors coming by car, public transport cycle and walking (e.g. the guidance suggests that modal split targets of 10-20% reduction in employee car use over 3 years is achievable)		
		19 – Specify the date by which the targets will be achieved		
		20 – Specify a timetable for the implementation of each of the measures proposed		
F. Responsibility and Ownership	Who is responsible (the owner) for delivering each stage of the T.P. and for implementing the proposed measures, actions and targets (e.g. by appointment of a travel plan co-ordinator/ Travel Plan Champion), and how this will be passed on/ managed	21 – Appoint Travel Plan Co-ordinator with overall responsibility for delivery of measures, targets and timetables		
		22 – Identify who or which organisation/ body will have delegated responsibilities for the implementation and financing to EACH of the Travel Plan measures proposed		

Heading	Issues to cover	Steps to be taken	√	Date
G. Monitoring and Review	What arrangements will be put in place to review and monitor the plan and to assess whether the objectives are being met	24 – State WHAT will be measured (e.g. number of trips to and from the site by car, public transport, cycle and walking, no. of car parking spaces)		
		24 – Detail WHEN this monitoring will take place (normally annually)		
		26 – Identify WHO will carry out the survey/ monitoring		
		27 – Indicate how the survey/ monitoring will be FUNDED		
		28 – AGREE with the Council how the outcomes will be REVIEWED		
		29 – Identify what measures will be introduced if targets are not achieved		
H. Communication Strategy	How information on the plan, its progress, impacts benefits and successes will be disseminated to influence all trips. Offer of incentives to travel sustainably.	30 – State how each of the Travel Plan measures will be marketed to staff, residents, visitors, students etc to influence all trips (e.g. by newsletter, intranet, notice boards, external publicity, welcome packs, etc.)		
		31 – Identify what incentives will be offered to all users to promote, encourage and deliver each of the Travel Plan measures		

## Appendix 3 –s106 Agreement example definitions and clauses

Note: the terms Owner / Developer / Occupier are used interchangeably in the following section, with the correct term to be used as appropriate to specific developments

The definitions and clauses listed below are by no means an exhaustive list, and each development, travel plan and s106 will be assessed on its own merits with site specific definitions and clauses likely to be required. This appendix is intended to provide the basic minimum requirements for agreements relating to travel plans and provide the starting point for further obligations.

### To be included in all agreements

Definitions:

Annual Travel Plan Review: means a report to be submitted by the Owner to the Council which shall include inter alia:

- (i) details of the actions taken by the Owners within the previous 12 months to comply with the Approved Travel Plan
- (ii) a statement(s) as to whether the recommendations in the Approved Travel Plan have been complied with and the targets set out in the Approved Travel Plan have been achieved
- (iii) details of the measures to be taken to remedy any failure to comply with the recommendations or meet the targets
- (iv) plan of actions to be undertaken in the next 12 months, stating who will deliver the action and by when

Approved Travel Plan: means the Travel Plan annexed at the Appendix to this Agreement entitled [ ] and dated [ ]

Monitoring: means a survey of employees / residents / users using a questionnaire in a form approved by the Council with the object of ascertaining the modes of transport used by the employees / residents / users when travelling between home and the development on a particular day (or any other alternative method of achieving that object approved in writing by the Council)

Monitoring period: means the period of ( ) years beginning on the occupation date.

Travel Plan Review Fee: means the sum of [ ] being the Owner's contribution towards the costs incurred or to be incurred by the Council in monitoring the delivery and continuance of the Approved Travel Plan

Travel Plan Coordinator: means the person appointed by the Developer and/or Owner as detailed in the Travel Plan who shall be responsible for securing the implementation of the Travel Plan and the day-to-day management of the steps identified in the Travel Plan to be taken to achieve the targets

Clauses:

To use reasonable endeavours to implement and thereafter comply with the terms of the Travel Plan appended to this agreement at all times during the period when the development is first advertised and marketed for sale and then subsequently occupied in accordance with the Planning Permission

To comply with the terms of the Approved Travel Plan (or any variation thereof as may be agreed between the parties hereafter) at all times at which the development is occupied

Not to occupy or allow or permit the Development to be commenced / occupied until the Travel Plan Review Fee has been paid to the Council

Prior to the occupation / commencement of the development / each phase the Owner / Developer shall appoint the (site wide) Travel Plan Coordinator and notify the Council in writing of the name, address, telephone number and email address of the person appointed.

To monitor and review all actions taken by the Owner to comply with the Travel Plan and to submit an Annual Travel Plan Review to the Council on the first anniversary of the occupation of the Development and annually thereafter

**Example definitions / clauses – this section is intended to provide examples of clauses used within Leeds and the Good Practice Guidance. By their nature, many TPs and associated s106 clauses will be site specific and will require tailored obligations**

## **Car Club**

### Definitions

Accredited Car Club Provider: means the current Leeds City Council approved Car Club operator accredited in the United Kingdom by Car Plus which provides cars for use by members of a Car Club in consideration of payment therefore

Car Club: means a local club operated and managed by an Accredited Car Club Provider in which members can book cars owned by the Accredited Car Club Provider and parked in specifically reserved car club spaces and use them for the period of the booking

Car Club Contribution: the sum in £ (pounds) to be paid to the Council as a contribution to the costs to be incurred in the provision of the Car Club at the development including any costs associated with a TRO and also including the Car Club administration and set up fee, marketing fee, annual membership and drive time fee, and corporate membership fee where appropriate.

Car Club Scheme: means the provision of a twelve-month membership to a Car Club together with free drive time

Car Plus: the national charity promoting responsible car use and which operates an accreditation scheme for Car Clubs

TRO: a Traffic Regulation Order made under the Road Traffic Regulation Act 1984 and all other enabling powers by the Council under its powers as a highway authority to support any enforceable traffic or highways measures.

### Owner's Covenants

Prior to Commencement of Development to submit to the Chief Planning Officer details of the name of and correspondence with the Council's approved and Accredited Car Club Providers indicating the intention of the Owner to establish a Car Club at the Property including a proposed establishment date for his approval and not to Commence Development and until the Accredited Car Club Provider for the Development has been approved by the Chief Planning Officer and appointed to provide a Car Club at the Property

Not to Occupy or permit or allow the Occupation of any part of the Development until

- (i) the car club parking space[s] at XXX, shown edged green on Plan XXX, attached, has

been clearly marked out on the Property [or on the public highway in accordance with the TRO] with the words “Car Club” used solely for the purpose of parking and storing a vehicle belonging to the Accredited Car Club Provider and used by members of the Car Club and the Owner further undertakes thereafter not to permit or allow the said car parking space to be used for any purpose other than for the parking and storage of the vehicle provided by the Accredited Car Club Provider and used by the members of the Car Club

- (ii) it has promoted and advertised to each potential occupier of the Development the value and benefits of membership of the Car Club
- (iii) it has included a provision in any transfer lease licence or tenancy agreement affecting the whole or any part of the Property that each Unit of Occupation shall be entitled to belong to the Car Club at the Property
- (iv) it has procured that each Unit of Occupation forming part of the Development has free membership in the Car Club scheme present on the Development per Unit of Occupation; for a period of one year from the date of commencement of operation of the Car Club managed and operated by the Accredited Car Club Provider
- (v) it has in conjunction with the Car Club operator put in place all the measures necessary to publicise the scheme and invite, and join, into membership all corporate and individual users appropriate to the development provided and distributed or through the Accredited Car Club Provider has procured the provision and distribution of marketing literature to occupiers that publicises the presence of the Car Club within the Development and invites such occupiers to become members of the Car Club

Following the provision of the Car Club Space, to maintain the Car Club Space in good and substantial repair and to repaint/renew the signage and/or painting of the words “Car Club” thereafter. *[NB: this is applicable if the parking space is on private land on the Development. If the parking bay is situated on the public highway and provided under a TRO the work will be undertaken by the Highways and Transportation Division of the Council using the TRO element of the Car Club Contribution]*

In the event that the Accredited Car Club Provider is no longer able to provide the Car Club for the Development the Owner shall notify the Chief Planning Officer in writing and shall then use all reasonable endeavours to secure another Accredited Car Club Provider for the Development in accordance with the provisions of this Deed

Upon Commencement of Development to pay the Car Club Contribution of £ (pounds) to cover the provision of the car club.

## **Modal Split / Trip generation**

### Definitions

Modal Shift: means an increase in the proportion of persons travelling to and from the site using more sustainable modes of transport (where walking, cycling, powered two wheelers, or the use of public transport are more sustainable than using a car)

Travel Plan Targets: means the Baseline Trips/Targets contained in paragraph x.x of the approved Travel Plan



Modal Split Target: means the percentage of staff/ resident / student / visitor vehicle trips to and from the Development made by users as the single occupant of a vehicle (SOV) during a [defined period] in one work day, being xx% of one way trips in the first year of Occupation, and decreasing by xx% per year thereafter for the following 4 years to a 5 year target of xx% SOV

Peak Time Target: means the two way vehicle generation rate of non-operational trips specified in the Transport Statement being xxx vehicles in the AM Peak and xxx vehicles in the PM Peak.

Traffic Report: means a report prepared by an independent transport consultant and agreed by the Council setting out the results obtained from the surveys of vehicles and employees entering and leaving the Land and identifying the number of vehicles, if any, which during the course of the survey exceeded the Peak Time Target and/or the Modal Split Target

Prior to the commencement of development the Owner will submit to the Council for approval a marketing plan which will be designed to deliver increased usage and improve the percentage of trips to the development by sustainable modes in accordance with detailed measures in the travel plan and shall implement the approved marketing plan in accordance with the provisions thereof.

## **Metrocards**

### Definitions

Metro: means the West Yorkshire Integrated Transport Authority

Metrocard: means a Metro travel card to be provided to the occupants in accordance with the provision of paragraph x of the First Schedule that can be used on countywide buses and trains

Metrocard Sum: means a sum calculated on the basis of £xx per each dwelling house x 0.60 in accordance with the 'Metrocard – Residential Metrocard Scheme Terms and Conditions March 2010 attached at the xth Schedule

Residential Metrocard Scheme: means the joint initiative between Metro and West Yorkshire public transport operators that aims to encourage public transport use by house occupiers at new residential development sites through the provision of discounted (free in the first year and discounted in years 2 & 3) Metrocards and public transport information thus helping to establish sustainable travel patterns a copy of which is attached to this Agreement at the xth Schedule

### Clauses

To enter into an arrangement with Metro in relation to the Residential Metrocard Scheme to provide virtually unlimited travel on public transport throughout West Yorkshire to the Occupiers of the Development

To pay to the Council the Metrocard sum prior to first occupation of the development

The Owner shall provide the Council with written confirmation that the obligation relating to the Metrocard scheme as referred to above has been complied with prior to first Occupation of the Development.

## **Other Measures**

### Definitions

Travel Plan Steering Group: means the Steering Group set up in accordance with the Travel Plan such membership to include representative from the Owner, the Council, the Highways Authority, the Travel Plan Coordinator, and the WYPTE

## Car Parking Scheme

means a scheme to be submitted by the Owner to the Council for approval for:-

1. the provision of public car parking within the Development which actively promotes short stay parking and actively discourages long stay parking at the Development such scheme to include details of:-

(a) signing and lining of the car parking spaces

(b) tariff controls

and an implementation programme for the timing of the provision of the public car parking; and

2. the control of the use and provision of car parking within the multi storey car park to be provided within Phase 3 of the Development or car parking elsewhere in the Development for use by residents and staff of the Development to ensure that the provision of car parking does not exceed UDPR maximum guideline figures and to set out what steps the Owner will take to prevent these guideline figures from being exceeded;

## Clauses

No earlier than 12 or later than 18 months after the occupation of the Development and annually thereafter for a period of 4 years, to instruct an independent transport consultant to undertake a survey of the means of travel by all employees / residents / students / customers patients / visitors to and from the Land

The car parking spaces to be provided for employees and visitors to the development shall be confined to areas specifically designated for such purpose. Allocation of car parking spaces to any (B1 etc) tenant of the development whether occupying the whole or part of any building shall be restricted to a car parking ratio such that the car parking ratio across the whole of the site does not exceed (1:30sqm) gross floor area

## Mitigation / Remedial measures

Travel Plan Bond: means the sum of £xx index linked to be paid by the Owner to the Council in conjunction to the Travel Plan Steering Group to mitigate the impact of the Development should the Travel Plan targets not be met

**Travel Plan Sanction:** means the sum of £ ( pounds) index linked being a cost towards sustainable travel measures to be identified by the Council (taking into account all reasonable representations made by the Owner) as being necessary to mitigate the impact on the highway network in the vicinity of the Land of the Owners failure to meet the Peak Time Target

means the sum calculated by reference to the number of single occupancy vehicle trips which exceed the Modal Split Target as follows below :-

(i) no sanction for up to xx SOV trips;

(ii) £xx for xx to xx SOV trips;

(iii) £xx for xx to xx SOV trips;

being a contribution towards travel and transport measures to be identified by the Council (taking into account all reasonable representations made by the Owner) as being necessary to mitigate the impact on the highway network in the vicinity of the Land of the Leasehold Owner's failure to meet the Modal Split Target and which such sums the Council may (in consultation with the Leasehold Owner but at the Council's sole discretion) allocate towards measures which may be included in the Travel Plan following an Annual Travel Plan Review;

Traffic Management Monitoring: means the annual monitoring for a period of 3 years after the substantial occupation of the development of on street parking in the area as defined in the appended plan.

If the Annual Monitoring Report demonstrates that the Travel Plan Targets have not been met:

- (a) The Council, in consultation with the Travel Plan Steering Group, will utilise such proportion of the Travel Plan Bond as is necessary to mitigate the impact of the Development to enable the Travel Plan Targets to be met; and
- (b) The Owner shall within 3 months of submission of the Annual Monitoring Report submit to the Council and implement an action plan setting out the measures to be taken by the Owner to meet the Travel Plan Targets until the next Annual Monitoring Report submission date.

Should the Owner fail to submit the Annual Monitoring Report, the Council shall at its discretion in consultation with the Travel Plan Steering Group utilise the Travel Plan Bond to mitigate the impact of the Development upon the transport network within the vicinity of the Land

If the Annual Monitoring Report demonstrates that the Travel Plan Targets have been exceeded the Owner will implement the remedial measures as set out in Clause [ ]

Traffic Management Scheme: means the provision of measures to restrict development related parking in the vicinity of the site

Parking survey and controlled parking zones – see DCLG / DfT Good Practice Guidelines: Delivering Travel Plans through the Planning Process (2009) Appendix C

No development shall commence on any part of Phase 2 of the site (as defined in this agreement) unless the preceding 3 month average of the recorded weekday morning peak period arrivals between 08.00 and 09.00 (as measured and provided to the Local Planning Authority in accordance with this agreement) is less than or equal to XX single vehicle occupancy trips for the development.

The Owner shall if so required by the Council secure that the results of each monitoring are verified by an independent Auditor within two calendar months of the monitoring taking place by methods that accord with the reasonable requirements of the Council.

The Owner undertakes to use all reasonable, measures and best endeavours to achieve an annual survey response rate of [xx]%

For the avoidance of doubt the Owner is responsible for the costs of monitoring and auditing and any remuneration and expenses payable to the Travel Plan Coordinator and the Auditor