

Appendix F – Travel Plan – Additional Information

Checklists

Full Travel Plan Checklist

Section	Content	Req.?	Comp.?	Comment
Introduction	Full address and contact details of developer and person/firm responsible for the preparation of the Travel Plan	✓		
	Development details:			
	• Site name, address and plan	✓		
	• Proposed land use(s), size and build out	✓		
	• Expected occupancy levels (residents/staff/customers/visitors)	✓		
	• Relevant site-specific local policy issues or requirements	✓		
	• Planning application reference	✓		
	Confirmation of Travel Plan type and implementation option	✓		
	Summary of main aims and objectives	✓		
Site Audit	Site local transport context:	✓		
	• Pedestrian access (are routes direct, clearly signposted well maintained and safe)	✓		
	• Cycle access (network conditions and facilities)	✓		
	• Public transport access (service proximity, frequencies and facilities)	✓		
	• Vehicular access (current and potential future access arrangements, areas of congestion and parking issues)	✓		
	Survey results and mode split data:	✓		
	• Survey description (including date and type)	✓		
	• Number of surveys undertaken and response rate (if applicable)	✓		
	• Expected trip generation	✓		
• Modal split forecast results	✓			
Objectives and Targets	Clear objectives, linked back to issues and barriers identified in site audit (must be SMART, for each monitoring year and overall period)	✓		

Section	Content	Req.?	Comp.?	Comment
	Clear targets, linked back to issues, barriers and forecasts presented in site audit (must be SMART, for each monitoring year and overall period)	✓		
Action Plan	Marketing and Communication Strategy outlining how sustainable travel information and events will be provided throughout the life of the Travel Plan	✓		
	List of appropriate measures (infrastructure and initiatives):	✓		
	• Description of each measure, linked back to objectives and targets	✓		
	• Evidence supporting measure and ability to meet targets	✓		
	• Timescales	✓		
	• Costs associated with each measure	✓		
	Clear, detailed implementation timetable (Gantt chart/similar)	✓		
Management Arrangements	Fully costed budget envelope, including costs associated with Travel Plan Coordinator and monitoring	✓		
	Confirmation/explanation of funding mechanism(s) (draft Section 106 agreement, if relevant)	✓		
	Evidence of senior management endorsement and commitment to identify/recruit a Travel Plan co-ordinator prior to construction	✓		
	Description of Travel Plan Co-ordinator role and responsibilities	✓		
Monitoring and Review	Name and contact details for Travel Plan Co-ordinator, if appointed. Alternatively, name and contact details for the individual responsible for appointing the Travel Plan Co-ordinator	✓		
	Schedule for travel plan meetings	✓		
	Travel Plan monitoring commitment, including:	✓		
	• the proposed start date (e.g. 30th dwelling completion)	✓		
	• monitoring years (typically Years 1, 3 and 5 but may be longer if requested)	✓		
	• report submission dates	✓		
Monitoring and Review	Details of how the progress of the Travel Plan will be monitored and reviewed, including the following:	✓		
	• Type of surveys required	✓		

Section	Content	Req.?	Comp.?	Comment
	<ul style="list-style-type: none"> • How surveys will be undertaken, including timing and duration 	✓		
	<ul style="list-style-type: none"> • Who will be responsible for undertaking surveys 	✓		
	Description of how remedial actions will be developed and agreed with the Council, in the event that agreed deliverables and targets are not met	✓		
	Legacy management statement, considering how Travel Plan measures can continue to be implemented beyond the period defined for planning purposes	✓		

Interim Travel Plan Checklist

* Content requirements listed as “indicative” should be completed based upon probable land uses, with assumptions clearly defined in the introduction section

Section	Content	Req.?	Comp.?	Comment
Introduction	Full address and contact details of developer and person/firm responsible for the preparation of the Travel Plan	✓		
	Development details:			
	• Site name, address and plan	✓		
	• Proposed land use(s), size and build out	✓		
	• Expected occupancy levels (residents/staff/customers/visitors)	✓		
	• Relevant site-specific local policy issues or requirements	✓		
	• Planning application reference	✓		
	Confirmation of Travel Plan type and implementation option	✓		
	Summary of main aims and objectives	✓		
Site Audit	Site local transport context:	✓		
	• Pedestrian access (are routes direct, clearly signposted well maintained and safe)	✓		
	• Cycle access (network conditions and facilities)	✓		
	• Public transport access (service proximity, frequencies and facilities)	✓		
	• Vehicular access (current and potential future access arrangements, areas of congestion and parking issues)	✓		
Objectives and Targets	Clear objectives, linked back to issues and barriers identified in site audit (must be SMART, for each monitoring year and overall period)	Indicative		
	Clear targets, linked back to issues, barriers and forecasts presented in site audit (must be SMART, for each monitoring year and overall period)	Indicative		
Action Plan	Marketing and Communication Strategy outlining how sustainable travel information and events will be provided throughout the life of the Travel Plan	Indicative		
	List of appropriate measures (infrastructure and initiatives):	✓		
	• Description of each measure, linked back to objectives and targets	✓		

Section	Content	Req.?	Comp.?	Comment
	• Evidence supporting measure and ability to meet targets	Indicative		
	• Timescales	Indicative		
	• Costs associated with each measure	Indicative		
	Clear, detailed implementation timetable (Gantt chart/similar)	Indicative		
	Confirmation/explanation of funding mechanism(s) (draft Section 106 agreement, if relevant)	Indicative		
Management Arrangements	Evidence of senior management endorsement and commitment to identify/recruit a Travel Plan co-ordinator prior to construction	✓		
	Description of Travel Plan Co-ordinator role and responsibilities	✓		
	Name and contact details for Travel Plan Co-ordinator, if appointed. Alternatively, name and contact details for the individual responsible for appointing the Travel Plan Co-ordinator	✓		
Monitoring and Review	Travel Plan monitoring commitment, including:	Indicative		
	• the proposed start date (e.g. 30th dwelling completion)	Indicative		
	• monitoring years (typically Years 1, 3 and 5 but may be longer if requested)	Indicative		
	• report submission dates	Indicative		
	Details of how the progress of the Travel Plan will be monitored and reviewed, including the following:	✓		
	• Type of surveys required	✓		
	• How surveys will be undertaken, including timing and duration	Indicative		
	• Who will be responsible for undertaking surveys	✓		
Description of how remedial actions will be developed and agreed with the Council, in the event that agreed deliverables and targets are not met	Indicative			
Legacy management statement, considering how Travel Plan measures can continue to be implemented beyond the period defined for planning purposes	Indicative			

Framework Travel Plan Checklist

* Content requirements listed as “indicative” should be completed based upon probable land uses (and/or users), with assumptions clearly defined in the introduction section

Section	Content	Req.?	Comp.?	Comment
Introduction	Full address and contact details of developer and person/firm responsible for the preparation of the Travel Plan	✓		
	Development details:			
	• Site name, address and plan	✓		
	• Proposed land use(s), size and build out	✓		
	• Expected occupancy levels (residents/staff/customers/visitors)	✓		
	• Relevant site-specific local policy issues or requirements	✓		
	• Planning application reference	✓		
	Confirmation of Travel Plan type and implementation option	✓		
	Summary of main aims and objectives	✓		
Site Audit	Site local transport context:	✓		
	• Pedestrian access (are routes direct, clearly signposted well maintained and safe)	✓		
	• Cycle access (network conditions and facilities)	✓		
	• Public transport access (service proximity, frequencies and facilities)	✓		
	• Vehicular access (current and potential future access arrangements, areas of congestion and parking issues)	✓		
Objectives and Targets	Clear objectives, linked back to issues and barriers identified in site audit (must be SMART, for each monitoring year and overall period)	Indicative		
	Clear targets, linked back to issues, barriers and forecasts presented in site audit (must be SMART, for each monitoring year and overall period)	Indicative		
Action Plan	Marketing and Communication Strategy outlining how sustainable travel information and events will be provided throughout the life of the Travel Plan	Indicative		
	List of appropriate measures (infrastructure and initiatives):	✓		
	• Description of each measure, linked back to objectives and targets	✓		

Section	Content	Req.?	Comp.?	Comment
	• Evidence supporting measure and ability to meet targets	Indicative		
	• Timescales	Indicative		
	• Costs associated with each measure	Indicative		
	Clear, detailed implementation timetable (Gantt chart/similar)	Indicative		
	Confirmation/explanation of funding mechanism(s) (draft Section 106 agreement, if relevant)	Indicative		
Management Arrangements	Evidence of senior management endorsement and commitment to identify/recruit a Travel Plan co-ordinator prior to construction	✓		
	Description of Travel Plan Co-ordinator role and responsibilities	✓		
	Name and contact details for Travel Plan Co-ordinator, if appointed. Alternatively, name and contact details for the individual responsible for appointing the Travel Plan Co-ordinator	✓		
Monitoring and Review	Travel Plan monitoring commitment, including:	Indicative		
	• the proposed start date (e.g. 30th dwelling completion)	Indicative		
	• monitoring years (typically Years 1, 3 and 5 but may be longer if requested)	Indicative		
	• report submission dates	Indicative		
	Details of how the progress of the Travel Plan will be monitored and reviewed, including the following:	✓		
	• Type of surveys required	✓		
	• How surveys will be undertaken, including timing and duration	Indicative		
	• Who will be responsible for undertaking surveys	✓		
Description of how remedial actions will be developed and agreed with the Council, in the event that agreed deliverables and targets are not met	Indicative			
Legacy management statement, considering how Travel Plan measures can continue to be implemented beyond the period defined for planning purposes	Indicative			

Travel Plan Statement Checklist

Section	Content	Req.?	Comp.?	Comment
Introduction	Full address and contact details of developer and person/firm responsible for the preparation of the Travel Plan	✓		
	Development details:			
	• Site name, address and plan	✓		
	• Proposed land use(s), size and build out	✓		
	• Expected occupancy levels (residents/staff/customers/visitors)	✓		
	• Relevant site-specific local policy issues or requirements	✓		
	• Planning application reference	✓		
	Confirmation of Travel Plan type and implementation option	✓		
Site Audit	Site local transport context: <ul style="list-style-type: none"> • Pedestrian access (are routes direct, clearly signposted, well maintained and safe) • Cycle access (network conditions and facilities) • Public transport access (service proximity, frequencies and facilities) • Vehicular access (current and potential future access arrangements, areas of congestion and parking issues) 	Summary		
Objectives and Targets	Clear objectives, linked back to issues and barriers identified in site audit (must be SMART, for each monitoring year and overall period)	✓		
Action Plan	Marketing and Communication Strategy outlining how sustainable travel information and events will be provided throughout the life of the Travel Plan	✓		
	List of appropriate measures (infrastructure and initiatives):	✓		
	• Description of each measure, linked back to objectives and targets	✓		
	• Evidence supporting measure and ability to meet targets	✓		
	• Timescales	✓		
	• Costs associated with each measure	✓		

Potential Measures

Non-Infrastructure

Measure	Land Use			Suitable Modes		
	Residential	Work	School	SOV	Active	PT
Financial incentives for those using active travel modes to work: weekly allowance (including vouchers/facility credits)		✓			✓	
'Niceties" such as umbrellas, pedometers, high-vis, water bottles	✓	✓	✓		✓	
Pedometers and activity monitoring apps can be useful tools for motivation and behaviour change to encourage sustainable travel and physical activity.	✓	✓	✓		✓	
Benefits marketing: active engagement (roadshows/stalls), leaflets, 'postcode plots' (for PTP), digital communication e.g. email, social media	✓	✓	✓		✓	✓
'Dr Bike': on-site repair services and/or maintenance advice sessions	✓	✓	✓		✓	
Cycle to Work scheme (either provision or explanation)	✓	✓	✓		✓	
PT Financial incentives: Interest-free season ticket loans, travel discounts/subsidies, work bus service		✓	✓			✓
Focussed marketing and potential user segmentation	✓	✓	✓	✓	✓	✓
Disincentivising use of the car: Charging for parking; removing car spaces		✓	✓	✓	✓	✓
Car sharing database	✓	✓	✓	✓		
Market benefits of car sharing (cost, social, environmental)	✓	✓	✓	✓		
Financial measures supporting car sharing (Mileage rates, emergency ride home, initial prizes)	Emergency ride home	✓	✓	✓		
Organisational culture (flexible working hours)		✓	✓	✓		✓
Organisational culture (work from home, audio/video conferencing, business travel policy)		✓		✓		
Personal travel planning	✓	✓	✓	✓	✓	✓
Set up or attend a local transport forum (for shared issues)		✓		✓	✓	✓
Sustainable Travel Information pack which includes walking and cycling maps and or links to online resources, highlighting distances to local amenities, information on local cycling training and support groups	✓	✓	✓	✓	✓	✓
Link with national events (such as bike week, walk to work week)	✓	✓	✓	✓	✓	✓

Measure	Land Use			Suitable Modes		
	Residential	Work	School	SOV	Active	PT
Lunchtime walking/running groups including links to existing groups in addition to creating new groups.		✓			✓	
Create and support a Bicycle User Group (shared issues, support and encouragement)		✓			✓	
Pool bikes (or support discount to sharing scheme)	✓	✓	✓		✓	
Taster passes or tickets	✓	✓	✓			✓
Pool cars for business use (enables staff to still commute via other modes)		✓		✓	✓	✓
Incentivise car sharing (premium parking spaces etc.)		✓		✓		
Annual challenges/other 'gamification' (annual pedometer challenges etc.)	✓	✓	✓	✓	✓	✓
Security bike marking	✓	✓	✓		✓	
Public transport information displays (up-to-date)	✓	✓	✓			✓
Discounted/subsidised driver training to improve safety and skills (including eco driving)		✓				
Walking buses			✓		✓	
'Scoot to school'			✓		✓	
Sustainable travel lesson plans			✓		✓	
Independent travel training			✓		✓	
Junior road safety officers			✓		✓	
Provision of cycle training, signposting to existing training	✓	✓	✓		✓	
Promote/establish Park & Walk schemes		✓			✓	
Cycle buddy scheme	✓	✓	✓		✓	

Considerations for Design and Infrastructure

- Permeability of site for pedestrians and cyclists
- Highways safety measures / traffic calming / pedestrian and cycle friendly infrastructure
- Site speed limits
- Restrictions on car movements within the site
- Parking restraint or car-free site (with provision for disabled parking) Location of parking to minimise intrusion and avoid dominance of the site
- Areas for social exchange, recreation, seating, play and biodiversity
- Cycle parking for residents and visitors
- Cycle shower / changing facilities in site workplaces (if applicable)
- Requirements for bus routing considered in road design Bus infrastructure – e.g. bus stops, shelters, bus gates and real time information (note – parish council approval required as they will be responsible for maintenance of shelters).
- Adoption of home zone principles or home zone features
- Electric vehicle charging points (incl. mobility scooters in sheltered secure location)

Costs and Fees

Use Class	Sub-Category	Cost per square metre (GFA)
B2	Industrial and Manufacturing	£17.73
B8	Final Mile Distribution Centre	£11.80
C1_i	Hotel: Budget	£435.21 per bed
C1_ii	Hotel: Upscale	£435.21 per bed
E(a)_i	Retail: High Street / Foodstore	£29.81
E(a)_ii	Retail: Warehouse	£23.84
E(b)	Restaurants and Cafes	£29.81
E(c)	Financial and Professional Services	£31.31
E(g)_i	General Office	£37.58
E(g)_ii	R&D Space	£18.52
E(g)_iii	Light Industrial	£18.90

Illustrative Planning Obligations and Conditions

Conditions:

Travel Plan – Not Submitted

You are advised that a Travel Plan is required to be prepared and submitted following the [ADD SPD NAME] at [ADD WEBLINK]

No building or use hereby permitted shall be occupied or use commenced until a Travel Plan comprising immediate, continuing and long-term measures to promote and encourage sustainable travel has been prepared, submitted to and approved in writing by the Local Planning Authority.

The travel plan should set out:

- objectives and targets for promoting sustainable travel,
- appointment, contact details and funding of a travel plan coordinator,
- details of an annual monitoring and review process,
- details of annual reporting to BaNES,
- means of funding of the travel plan, and;
- an implementation timetable, lasting at least 5 years and 6 months, including the responsible body for each action.

The approved Travel Plan shall be implemented, monitored and reviewed in accordance with the agreed Travel Plan Targets to the satisfaction of the council.

Reason: In order to deliver sustainable transport objectives in accordance with Policy XX of [LOCAL PLAN DOC].

Travel Plan Statement – Not Submitted

You are advised that a Travel Plan Statement is required to be prepared and submitted following the [ADD SPD NAME] at [ADD WEBLINK]

No building or use hereby permitted shall be occupied or use commenced until a Travel Plan Statement comprising immediate, continuing and long-term measures to promote and encourage sustainable travel has been prepared, submitted to and approved in writing by the Local Planning Authority.

The travel plan should set out:

- appointment, contact details and funding of a travel plan coordinator,
- objectives for promoting sustainable travel,
- an action plan, and;
- an implementation timetable.

The approved Travel Plan Statement shall be implemented prior to occupation of any part of the development and shall be continued thereafter in accordance with the details therein.

Reason: In order to deliver sustainable transport objectives in accordance with Policy XX of [LOCAL PLAN DOC].

Travel Plan – Submitted (and approved)

Prior to occupation or use commenced, evidence that the pre-occupation elements of the approved Travel Plan have been put in place shall be submitted to and approved in writing by the Local Planning Authority.

The approved Travel Plan shall then be implemented, monitored and reviewed in accordance with the agreed Travel Plan to the satisfaction of Local Planning Authority unless agreed in writing by the Local Planning Authority.

Reason: In order to deliver sustainable transport objectives in accordance with Policy XX of [LOCAL PLAN DOC].

Travel Plan Statement – Submitted (and approved)

The approved Travel Plan Statement shall be implemented prior to occupation of any part of the development in accordance with the action plan set out therein.

Within XX months of occupation, evidence of the implementation of the measures set out in Travel Plan Statement shall be prepared, submitted to and agreed in writing with the Local Planning Authority.

Reason: In order to deliver sustainable transport objectives in accordance with Policy XX of [LOCAL PLAN DOC].

Monitoring Fee Rationale

Monitoring Fees have been calculated to only cover reasonable costs incurred. As per CIL Regulations, charges for monitoring services will not generate a profit. Fees are indicative and may vary from site to site. The below is based upon developments with less than 100 dwellings or 2,500m² Gross Floor Area, with a monitoring period of five year (baseline, 1st, 3rd and 5th year review).

	Travel Plan Officer	Principal Transport Planner	Transport Team Manager
Approx. Rate (per hour)	£35	£50	£60
Site Visit (including travel)	4	0	0
Review report, analyse and write-up report	17	4	2
Meeting with developer	4	0	0
Total Hours	24	4	2
Total Cost (per year)	£875	£200	£120