

UPDATED TRAVEL PLAN GUIDANCE FOR DEVELOPERS AND PLANNING APPLICANTS

JULY 2011

Introduction

This document outlines how Kirklees Council uses the planning process to secure Travel Plans to improve and promote sustainable travel and to reduce the need to travel. Travel Plans are an integral part of Government policy on sustainability. Their aim is to improve the quality of life for everyone in Kirklees by facilitating development that is socially and economically beneficial and also environmentally sustainable.

This recently updated guidance considers how the process has recently been streamlined. Whilst the Council remains keen to see Full Travel Plans with detailed measures for encouraging sustainable travel delivered and implemented, it is recognised that this needs to occur at the most appropriate point in the development delivery process. The Council has therefore amended its processes and mechanisms to require the more appropriate level of detail for the appropriate step in the process. At the planning application stage, less detail will be required but the same level of commitment to Travel Plan delivery is a necessity. Once an application has been approved and the development is going forward, a Full Travel Plan will still be required prior to development commencing.

What is a Travel Plan?

According to the Department for Transport's Good Practice Guidelines: Delivering Travel Plans through the Planning Process (2009), a Travel Plan is "*a long-term management strategy for an occupier or site that seeks to deliver sustainable transport objectives through positive action and is articulated in a document that is regularly reviewed*". It is a package of measures to promote sustainable modes of travel to and from a site. It also helps to manage access to a site in order to reduce the impacts of vehicular transport on the local environment. It is a long term management tool particularly aimed at reducing the need to travel, gaining economic efficiencies, reducing the impact of car travel and encouraging greater use of public transport, cycling and walking.

When is a Travel Plan required?

The need for a Travel Plan is influenced by the scale of development. This Guidance applies only to larger scale developments defined by the thresholds detailed in Appendix A. These thresholds are guidelines that are applied consistently across the District. However Travel Plans may

be required for developments below these thresholds. Travel Plans apply to the whole of sites and the thresholds can be triggered by extensions to sites.

Types of Travel Plans

There are three main types of Travel Plan, namely Full, Interim and Framework Travel Plans. Full Travel Plans were until recently requested to be prepared and submitted with planning applications. Interim Travel Plans were only permitted when, under a few circumstances, it may not have been possible to complete a Full Travel Plan.

The Council will now accept Interim Travel Plans at the planning application stage of the process. The only exception to this is very large applications or those sites where the Highways Agency are a statutory consultee and are involved in the review of the application. A Full Travel Plan is still required for these applications.

Framework Travel Plans are produced for large mixed-use developments with multiple occupants, setting out the requirement for the occupants to produce their own Full Travel Plans upon occupation.

Interim and Framework Travel Plans are required to be worked up into Full Travel Plans prior to development commencing. All applications will be conditioned to ensure that this occurs.

Travel Plan Procedure

There are six stages in the Travel Plan process:

Stage A – Scoping - Early consultation with the Council is recommended to discuss Travel Plan requirements and agree with the Council, which type of Travel Plan is most appropriate. If a Full Travel Plan is required, this stage will also involve discussing the key issues to be addressed, the process and timetable to be followed, the scope and content of the Travel Plan and the outcomes sought.

Stage B - Pre-Application Discussions – Where a Full Travel Plan is required it should be submitted at this stage in draft form, so the detail may be discussed and agreed with the Council prior to submission.

Stage C – Submission - The Travel Plan (Full, Interim or Framework) should be submitted with the planning application which will not be validated until this document is received. Kirklees Council will assess the Travel Plan, conduct any required statutory consultation and, in the case of a Full Travel Plan, provide the applicant with written comments.

Stage D – Post-determination and Pre-occupation – If an Interim Travel Plan has been submitted at the planning application stage, it is important that the planning conditions (and section 106 agreement) applied to the permission relating to its development into a Full Travel Plan are discharged. This will require the production of a detailed Full Travel Plan. This document will need to be submitted to the Council for review and comment. Only once the Full Travel Plan is at a suitable standard as defined by the Council will the condition be discharged. Implementation of the Travel Plan should then commence prior to the completion or opening of the development. This is to ensure that the measures are in place to positively influence and affect employees' travel choices before their travel behaviour becomes fixed. The developer is responsible for passing the requirements of the Travel Plan onto each occupant and for progressing any outstanding Framework or Interim Travel Plans into Full Travel Plans before start of construction.

Stage E – Post-opening - Many elements of the Full Travel Plan will be implemented once the development has opened and is occupied. The success in achieving identified targets is measured through appropriate surveys. Baseline monitoring should occur within three months of occupation.

Stage F – Ongoing Monitoring - All Travel Plans need to be monitored and annual reports submitted to Kirklees Council. The Council will ensure Travel Plans are monitored and reported annually via the use of computer software 'i-TRACE'.

How to Produce a Travel Plan

The details of any Travel Plan will be unique to the site and developers should tailor their Travel Plan to the particular circumstances of the site and the proposed use. **Every Travel Plan, Full Interim or Framework, should be structured in a standard way. The level of detail required under each heading will vary according to the type of Travel Plan being prepared as outlined in Appendix B.** The standard structure is as follows:

Section 1: Executive Summary - The main aspects of the Travel Plan should be summarised and the applicant's commitment to the Travel Plan at a senior management level must be stated clearly.

Section 2: Background - There must be a description of the proposed development, site location (on a map), numbers of staff, residents, and/or users, proposed site use and measures already in place.

Section 3: Objectives - There should be a statement of what outcomes the Travel Plan is trying to achieve, reflecting the broader goals of local, regional and national policy.

Section 4: Site Travel Opportunities and Patterns - An overview of the travel options at the site that are available to employees, visitors and residents should be provided via a Site Audit. The Site Audit will assess the transport facilities on-site as well as the transport links and services to and from the site. Details of the surveys undertaken to establish travel patterns should also be provided.

Section 5: Targets and Indicators - Targets should be clearly worded as measurements of performance against the objectives set. Two sets of SMART (Specific, Measurable, Achievable, Realistic and Timed) targets should be provided:

- Targets linked to the maximum forecast number of trips generated by a site as identified in the Transport Assessment
- Mode share targets

Section 6: Measures - A description of the package of measures that will be implemented to help meet the set objectives and targets should be outlined as fully as possible. The appropriate range of measures will be unique to each site but will comprise both promotional initiatives and physical measures.

Section 7: Travel Plan Management - The responsibilities and management arrangements to implement the Travel Plan need to be clarified in the Travel Plan. The appointment of a Travel Plan Co-ordinator is critical to the success of the measures. The individual should be of the appropriate level to be responsible for implementing, progressing, promoting and monitoring the Travel Plan.

Section 8: Marketing and Promotion - All the measures in the Travel Plan must be communicated to the site users in an engaging way. The Travel Plan Co-ordinator will be expected to implement a strategy to promote the Travel Plan.

Section 9: Monitoring and Sanctions - To monitor performance against targets, data must be gathered on trip generation and modal share (as a minimum) at least annually. Plans will be required of what Travel Plan measures will be employed to remedy the situation should the Travel Plan not meet its targets and objectives.

Section 10: Action Plan - An Action Plan should be provided to summarise the steps to be taken, by whom and by when to implement the Travel Plan.

Securing a Travel Plan

The implementation and enforcement of Travel Plans is an essential part of the planning process. Legal Agreements (section 106 of the Town & Planning Act 1990) will be used to secure Full Travel Plans for larger and more complex developments. Planning Conditions (and section 106 agreements) will be used to ensure the development of Interim Travel Plans into Full Travel Plans.

Monitoring Travel Plans

A robust monitoring strategy must be incorporated into every Full Travel Plan and agreed with the Local Authority. Review meetings will be held regularly to assess performance against the targets specified in the Travel Plan, and to decide if alternative measures or approaches are to be pursued.

Enforcement and Sanctions

Where Travel Plan measures have not met the agreed targets and some remedy is necessary, the default mechanisms specified in the Travel Plan will be deployed. Enforcement action may be required where non compliance with a Section 106 agreement or planning condition occurs and this causes harm. The Council will take a proportionate approach, based on evidence.

Charges

Kirklees Council requires developers to contribute to the cost of monitoring Travel Plan progress. The Council charges an annual fee for five years for this service, with two rates based on the size of the development.

- **Large Scale Major Development defined as 200 or more residential units or 10,000 m² GFA or more for other types of development:
Cost: £3000 per annum for the first five years after opening**
- **Small Scale Major Development defined as between 50-199 residential units or at or above the thresholds defined in the table at Appendix A up to 9,999 m² GFA for other types of development
Cost: £2000 per annum for the first five years after opening**

This fee also covers assistance with the development of an Interim or Framework Travel Plan into a Full Travel Plan as part of the process to discharge a condition. Assistance will be provided by the Council to develop a Full Travel Plan reflecting the unique site conditions but using a standard template.

Appendix A : Thresholds for Travel Plan Production

Type of Development	Size
A1 Food Retail	≥ 800 m ²
A1 Non-Food Retail	≥ 1000 m ²
A2 Financial and Professional Services	≥ 2500 m ²
A3 Restaurants & Cafes	≥ 2500 m ²
A4 Drinking Establishments	≥ 600 m ²
A5 Hot Food Takeaway	≥ 500 m ²
B1 Business	≥ 2500 m ²
B2 General Industrial	≥ 2500 m ²
B8 Storage or Distribution	≥ 5000 m ²
C1 Hotels	≥100 bedrooms
C2 Residential Institutions – Hospitals, Nursing Homes	≥ 2500 m ²
C2 Residential Institutions – Residential Education	≥ 50 students
C2 Residential Institutions – Institutional Hostels	≥ 50 residents
C3 Dwelling Houses	≥ 50 units
D1 Non Residential Institutions	≥ 1000 m ²
D2 Assembly and Leisure	≥ 1000 m ²
Other: Pre-application discussion with Kirklees Council Highways & Transportation Service is required to determine if a Travel Plan is required.	

Appendix B : Travel Plan Checklist

REQUIRED CONTENT	INTERIM	FULL
1.0 Executive Summary		
<ul style="list-style-type: none"> • The applicant should state a commitment to the Travel Plan • The main aspects of the Plan should be summarised 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2.0 Background		
<ul style="list-style-type: none"> • Proposed development description, to include the numbers of people, proposed site use, measures already in place (if existing development) • Site plan/map of the development • If required, state when the Framework Travel Plan would be worked up to a Full Travel Plan 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3.0 Outcomes		
<ul style="list-style-type: none"> • Statement of what the Travel Plan is trying to achieve • Policy context and contribution 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
4.0 Site Travel Opportunities and Patterns		
<ul style="list-style-type: none"> • Create a summary of travel demand and options at the site that are available to users for all modes of transport • If applicable use the Transport Assessment to detail shortcomings of the site and how the Plan might address these 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
5.0 Targets		
<ul style="list-style-type: none"> • Targets should be set as measurements of the outcomes stated previously • Targets should be SMART (Specific, Measurable, Achievable, Realistic and Timed) 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
6.0 Measures		
<ul style="list-style-type: none"> • Description of measures to be implemented in order to achieve the above targets. This should include positive measures, such as public transport promotion, and restraining measures such as limiting the number of parking spaces available. 	<input type="checkbox"/>	<input type="checkbox"/>
7.0 Management Strategy		
<ul style="list-style-type: none"> • A Travel Plan Co-ordinator should be appointed to implement, progress, promote and monitor the Travel Plan • Funding & resources over the long term should be considered • Consideration within the Plan should the occupier change 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
8.0 Marketing and Promotion		
<ul style="list-style-type: none"> • Measures should be stated to communicate the Travel Plan to site users • A variety of promotion strategies should be used 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
9.0 Monitoring and Default mechanisms		
<ul style="list-style-type: none"> • Outline information to be gathered, method of assessment, and the frequency and duration of monitoring • Provision to feed back monitoring information to the Local Authority on a regular basis • Outline how remedies will be used if the Travel Plan is not meeting its targets and outcomes 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
10.0 Action Plan		
	<input type="checkbox"/>	<input type="checkbox"/>

