

SMBC Travel Planning Guidance for Developers

Travel Plan Guidance for Residential
Developments

SMBC

July 2022

Residential Developments



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What is a Residential Travel Plan?

A Residential Travel Plan (RTP) is a package of measures designed to reduce the number of and length of car trips generated by a residential development, whilst also supporting more sustainable forms of travel and reducing the overall need to travel.

A RTP can include a wide range of elements which include:

- Site design to maximise the opportunities for sustainable travel and access;
- Facilities that reduce the need to travel;
- Other services to support sustainable travel;
- Parking management schemes;
- Promotion and awareness raising package (e.g. Individualised Travel Marketing); and
- Measures and incentives to support complementary travel plans and other sustainable transport initiatives.

A RTP should identify:

- How the plan is to be delivered;
- Resources and arrangements for the implementation, co-ordination, and day-to-day management of measures;
- Appropriate management structures for ongoing decision-making and implementation;
- Time frames;
- Handover arrangements and monitoring arrangements;
- Targets;
- Arrangements for ongoing input from the local authority; and
- Provision for enforcement in event of non-delivery.

The following sections outline the initiatives which are considered effective in delivering a successful RTP. They focus on key techniques such as individualised travel marketing or personalised travel planning and explain why SMBC are promoting RTPs in the planning process. The types of developments appropriate for RTPs are also outlined, alongside the available options to implement a plan, and the subsequent developer contributions required.

Individualised Travel Marketing/ Personalised Travel Planning

Individualised Travel Marketing or Personalised Travel Planning is a dialogue-based technique designed to change personal travel behaviour. It uses personal contact with residents to provide them with personalised information on walking, cycling and public transport use and then offers incentives to try them.

The development of an Individualised Travel Marketing programme can also include:

- Production of customised local travel information such as stop specific bus timetables and neighbourhood sustainable travel maps; and
- Provision of discount cards for local cycling/outdoor shops and a home visit service providing specialist advice and incentives for walking, cycling and public transport.

Sustainable Travel Measures and Incentives

Sustainable travel measures and incentives comprise of any informative, promotional or motivational schemes or materials that have been identified as likely to encourage sustainable travel. This could include measures such as cycle training and vouchers which can incentivise residents to cycle. Public transport taster tickets and well timetabled and effectively promoted routes can also incentivise public transport use. These measures and incentives seek to provide better information and opportunities, aimed at helping residents to choose to reduce their car use, whilst also enhancing the attractiveness of alternatives. They are mostly uncontroversial, and often prove popular. They include:

- Personalised travel planning, travel awareness campaigns, and public transport information and marketing;

- Car clubs and car sharing schemes;
- Teleworking, teleconferencing and home shopping; and
- Taster tickets, vouchers and equipment for walking and cycling.

Car Clubs

An appropriate balance needs to be struck between the use of cars and encouraging more sustainable non-car modes of travel. Car clubs may be considered suitable for developments with issues surrounding parking capacity, and/or lack of sustainable transport links. Third parties such as Enterprise have previously provided car club schemes.

Why Are We Promoting Residential Travel Plans?

RTPs can reduce the transport impacts of medium to large developments by trip reduction and encouragement of alternative modes to the car. Individuals are most likely to change their travel habits when they are new to an area. New developments are therefore a prime opportunity to connect with, influence and inform residents to establish sustainable travel patterns for all types of journey purposes.

Types of Developments Suitable for Residential Travel Plans

RTPs are required for medium to large developments with over 50 units, as specified in TP development thresholds in Table 2.2 of the Master Travel Plan Guidance Document. RTPs may be required in specific circumstances for developments outside of these thresholds. In these instances, SMBC will enter into discussions with the developer concerning individual planning applications.

For mixed-use or phased developments with multiple occupants, a TP may also be required. The TP should clearly outline the overall objectives, targets and indicators for the entire site but be administered centrally. It should summarise the involvement required of site occupiers as part of the plan, and the timescales for individual units or phases to prepare and implement their own TPs if necessary. The TP should also highlight any important links between phases or parts of the development.

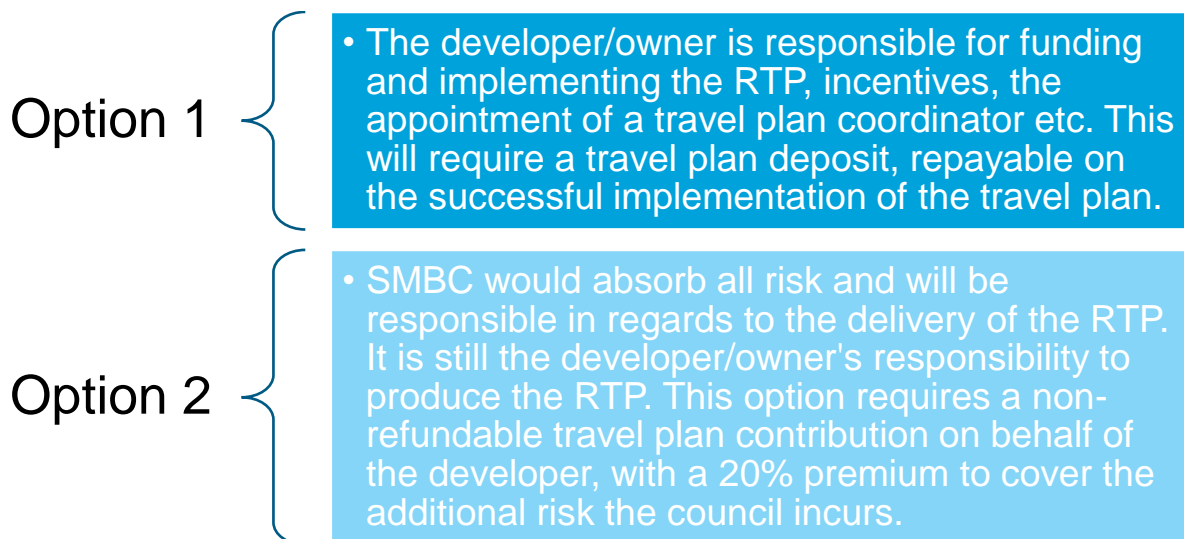
A RTP will require funding in order to be effective; funding sought from the developer can be used to pay SMBC to manage the implementation of the RTP. The funding would also need to cover monitoring the outcomes of the RTP and reporting back to the SMBC on progress towards targets.

Contributions sought for RTPs should not detract from contributions sought for improvements to walking, cycling and public transport facilities as these are all complementary parts of a sustainable transport package.

Developer Contributions

Appendix A outlines the contributions required for an RTP, for which there are two options for the responsibility of delivery:

Figure 1 - Developer Contribution Options



In each case, the RTP would still be subject to the non-refundable travel plan monitoring fee outlined in the Travel Plan Guidance Document.

Table 1 below outlines the costs of developing a successful RTP based on best practice measures from the Department for Transport (DfT).

The table outlines the cost of introducing incentives (such as a public transport time limited taster tickets or bike vouchers) and personalised travel planning (the cost involved in engaging with and advising residents on their travel options), which can be both be implemented as part of a RTP.

The costs involved in developing, implementing and managing the RTP are in addition to the aforementioned incentives and personalised travel planning measures required to deliver an RTP. These include other expenses, such as the staff costs for the appointed Travel Plan Coordinator etc.

Tariff of Contribution Costs/Deposits for Residential Travel Plans

This advice sheet provides information on the typical costings for RTP contributions/deposits.

Please see Table 1 overleaf for indicative costs of typical measures employed as part of a RTP, secured via a developer contribution/deposit.

Please refer to Appendix A for an estimated breakdown of the total contribution/deposit amount by number of residential units, which includes Contribution Options 1 and 2.

Appendix B provide further details on the roles and responsibilities of the Travel Plan Coordinator. This will provide further context for the Implementation & Coordination costings included in the tariff.

Table 1 – Example Personalised Travel Planning & Incentive Measures Breakdown¹

Travel Planning Measures	Total Cost	Cost Per Dwelling (150 Dwelling Example)
Bespoke completed design brochure (A5 size) also supplied in a PDF	£4,000.00	£26.67
Digital printed brochures in sealed envelopes (also branded accordingly).	£560.00	£3.73
Website pages within the Smarter Travel website to manage and monitor	£350.00	£2.33
Personal Travel Plans to be processed through the Smarter Travel website	£100.00	£0.67
1 x Adult cycle training session*	£4,500.00	£30.00
1 x Adult week travel pass (bus & train)*	£5,100.00	£34.00
1 x Fitbit for multiple adults*	£3,000.00	£20.00
1 x Cycle communal repair kit	£375.00	£2.50
1 prize (electric bike or annual public transport pass) per residential development for survey completion	£1,000.00	£6.67
Total Cost	£18,985.00	£133.90

*1 per dwelling

¹ Indicative costs for Travel Planning measures provided by SMBC's Sustainable Travel Team

Appendix A. Tariff of Contribution Costs Deposits for Residential Travel Plans

Appendix B. Travel Plan Coordinator Roles and Responsibilities

Role of the Residential Travel Plan Co-ordinator

The focus of the travel plan should be on the provision of key services and its communication with residents. The strategy adopted needs to involve engagement with residents at an individual level. 'Personal travel planning' techniques – in which individuals receive customised advice tailored to their journey needs – have been shown to encourage more sustainable travel patterns. A new development provides an opportunity to offer personal travel advice when residents have just moved in or even before, when they purchase or rent the property. At this point, new travel habits are being established and information about the services and facilities in the area are essential to achieving sustainable travel choices.

Good access by public transport, attractive walking and cycling facilities/training, the availability of cycle hire and measures to reduce the adverse effects of traffic are all positive features to be highlighted to potential residents in promotional materials. Explaining the site's transport characteristics from the beginning, for example the layout of bus routes, their frequency and duration as well as parking restrictions will help to avoid misunderstandings arising later.

Each newly occupied home should receive an initial communication and snap survey from the Travel Plan Coordinator. Explanation should be given about the travel opportunities of the site, the travel plan and its incentives, and the provision of detailed travel advice if desired. The provision of a location map illustrating public transport options, together with walking and cycling access to locally available services/destinations are particularly valuable. The welcome pack for each household can include the following measures:

- Free/discounted use of public transport, e.g. providing free public transport tasters for a specified number of people within each household
- Free/discounted use of cycle hire, e.g. a voucher to provide free membership for up to two adults per household for the first year
- A free/discounted bicycle or bicycle equipment, e.g. a voucher to provide this for a number of people within each household
- An offer of a visit from a personal travel adviser who can help provide information about sustainable travel that is specifically geared to the journey needs of the household
- An offer of locally based on-road cycle training for adults and children and bike buddy schemes
- Walking and cycling maps showing local walking and cycling routes in relation to local facilities such as sports centres, cinemas, pubs, health centres, shopping and routes to nearby green spaces and recreational trails by public transport and bike
- Links to local transport provider information – cycle hire scheme, bus and rail operators. Journey planning apps

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

- A community web page, regularly updated to provide comprehensive travel information of the type included in the welcome pack, with details of, timetable changes and new promotional offers. The page could also feature access to a community car-share database (or links to national schemes such as www.liftshare.com)
- A community noticeboard for travel information – again regularly updated
- Community travel events and forums– for example cycle promotion days and special launches for new services and residents are invited to give feedback to the Travel Plan Coordinator and service providers about travel arrangements
- A bicycle user group for the site together with free training and a cycle buddy scheme so that experienced cyclists can help less experienced ones get started (see www.BikeBUDi.com for other resources)
- Regular follow-up surveys or meetings with individual households to review the success of travel arrangements
- Regular review of the welcome packs and promotional offers to ensure that these are up-to-date and relevant to new, incoming residents

Example Summary of typical tasks/requirements

PHASE	MANAGEMENT	ACTIVITY	MECHANISM USED
Pre Construction	Travel plan prepared by developer	Agreed named Travel Plan Lead	Planning consent, including a S106
Construction	Travel Plan Coordinator in place before residents move in Establishment of steering group including key agencies	Liaising with training sales staff about transport benefits of the site Preparing marketing materials Ensuring TP measures are in place from the outset Publicity and launch of TP	Travel Plan Coordinator's responsibilities outlined in the travel plan Implementation of identified measures
Early Moving in Period	Travel Plan Coordinator in place (either employed by Developer or hand over to SMBC). Establishment of residents group or other structure	Provision of personalised travel marketing Promotion of individual plan measures Establish the management group for the plan and initiate meetings Monitoring and amendment of plan	Plan measures detailed in the original TP which is agreed as part of S106. Management structure for plan agreed as part of S106 Implementation of identified measures
Established Community and into the Future	Formal management structure to take on responsibility for the plan. Travel Plan Coordinator may continue indefinitely or have a finite term (eg five years after initial occupation)	Travel Plan Coordinator transfer of responsibilities for the TP to community group or other management structure.	Transfer of responsibilities outlined in original travel plan

Monitoring

Tracking progress in achieving targets to ensure compliance with planning obligations is one of the main purposes of monitoring RTPs. More generally, monitoring should provide regular information about how the plan is working in practice and whether it needs to be adjusted. Where monitoring reveals problems, there should be an opportunity to review the plan and to take remedial action. As with target setting, the particular monitoring needs of a development will depend on the site and nature of the proposal in question.

Nevertheless, a regular monitoring and reporting schedule needs to be established at the outset. This should take the form of a five-year cycle with the targets being comprehensively reviewed at the five-year point.

Monitoring schedules should propose:

- Trigger points for the initial review, eg at the stage the development reaches 75 per cent occupancy to provide the information base for future monitoring of the plan
- Full multi-modal travel surveys conducted at the first, third and fifth year after the initial travel plan trigger point has been reached
- Annual monitoring reports thereafter for the initial five years after full occupation
- A requirement after five years to outline how future monitoring will be undertaken if all the key travel plan targets have not been met

Typical Salary Costs

Including NI and Superannuation is **£44,757 pa**

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