Travel Plan Toolkit

NSW
GOVERNMENT

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Introduction

Travel Demand Management is the application of a focused, data led strategy that seeks to change demand on transport networks by redistributing journeys to other modes, times, routes or removing the journey altogether. It is most effectively applied when there is an impetus or catalyst for change.

A Travel Plan is a management strategy for delivering long term behavioural change and sustainable travel patterns across an organisation or precinct. It is about understanding how people make their transport decisions and using this to influence behaviours that lead to better customer outcomes, while reducing adverse impacts such as congestion.

NOTE If your Travel Plan is a condition of planning consent, you should consult with your relevant planning authority for advice on any additional specific requirements.

This toolkit provides the steps, templates and resources for developing a comprehensive Travel Plan. It is designed for the person or group responsible for developing and implementing a Travel Plan. Links to resources and more detailed information to help you develop a Travel Plan are provided at relevant sections throughout this document.

A full suite of templates and resources to help you prepare your Travel Plan is available online at **www.mysydney.nsw.gov.au/travelchoices/tdm**

Additional resources are also available on the Travel Choices website at **www.mysydney.nsw.gov.au/travelchoices/ resources** to help your organisation promote sustainable travel behaviour changes.

Questions or comments about the use of this Toolkit can be directed to **travelchoices@transport.nsw.gov.au**

The value of a Travel Plan

Travel Plans work because they are unique, evidence-based and tailored to the specific circumstances of an organisation or site. They lead to real benefits for the organisation, employees and broader community by developing sustainable and commonly agreed solutions.

Value to your organisation and staff				
Employee health	**Efficiency**	**Cost reduction**	**Sustainability**	**Site development** (if applicable)
• Generate an average of 20 min more exercise each day per person • Staff less likely to take sick leave • Staff up to three times more productive • Contribute to improved workplace culture, morale and engagement • Improve work life balance and reduce time spent commuting	• Improve reliability of staff arrival times • Improve reliability of deliveries • Reduce staff downtime spent travelling • Repurpose onsite car parking space • Provide better site access experience for employees, visitors and customers • Reduce local area traffic congestion	• Reduce costs associated with sick leave • Reduce parking costs • Reduce mileage claims • Improve staff recruitment and retention • Reduce travel costs for organisation and staff	• Encourage use of sustainable transport options • Improve your standing as an 'employer of choice' • Improve company image – environmental, corporate and social responsibility • Build relationships among local community • Contribute towards Green Star building rating	• Reduce development costs and potential to increase density of development (fewer parking spaces) • Enhance attractiveness and marketability of site • Increase property and/or letting value • Easier pathway to development approval • Mitigate adverse traffic impacts of a development • Improve community perception of development

How to develop a Travel Plan

While a Travel Plan could be developed in a number of ways, it is suggested you follow the program logic model outlined below so that your Travel Plan captures the appropriate information and is acted upon. This is a proven method which has been used by many organisations to provide a structured approach to planning, implementation and evaluation. Once developed, your Travel Plan needs to be monitored for performance to measure progress and adjusted as needed over time.

Travel Plan – program logic

A. Getting started
Identify preliminary needs – why is a Travel Plan being considered? Assess the current situation Establish program management Engage stakeholders

B. Developing your Travel Plan				
Identified organisational needs				
Inputs	Activities	Outputs	Impacts	Outcomes
Delivery starting point				Planning starting point
• What human, financial, organisational and community resources are needed to conduct the activities?	• What will be done? • Who will do it?	• What products and services need to be delivered to achieve the impacts?	• What measurable impact will the Plan have so that the outcomes are achieved?	• What significant benefits will result from having a Plan in place over the long term?

C. Monitoring and Reporting
Track progress, review and adjust when necessary (usually every 6-12 months).

The information in the following sections of the Travel Plan Toolkit can be used to help you fill out the

Travel Plan Template

A. Getting started

At a high level, why is a Travel Plan being considered?

Consider the drivers – both internal (travel accessibility for employees, workplace productivity, employee travel safety and security, employee health and wellbeing, business improvements, etc) and external (environmental sustainability, legal requirements, social responsibility, etc) to create a Travel Plan. Use this to help build the case for developing a Travel Plan.

Assess the travel and transport opportunities and challenges for your organisation.

Conduct a site assessment. A site assessment can be as simple as walking around a workplace and surrounding area and recording information about how to get around on foot and all other modes of transport.

↗ Site audit checklist

Also consider:
- frequency of transport services to the site and any future changes expected to the transport network. Transport for NSW has a range of publicly available data sources including Opal data (see **opendata. transport.nsw.gov.au**).
- land use development
- access issues for those who may feel more vulnerable or who have mobility impairments.

↗ Open data hub and developer portal

Record this information so that a broad spectrum of current travel opportunities and challenges can be presented to the organisation.

This assessment can also help you to determine which behaviour changes may have the most effect or benefits. For instance, there may be more seats or faster travel times on public transport services outside of the peak, which staff could take advantage of if the organisation enables flexible working.

Conduct an internal travel and transport policy assessment for your organisation. Look at internal human resource policies and other rules related to travel including car use and parking, working from home and business travel arrangements.

↗ Transport and policy assessment checklist

Collect data to get a robust understanding of how people are travelling to your site and the underlying causes of their behaviour. Some common approaches are:

- employee focus groups
- organisational travel surveys
- Australian Bureau of Statistics Census Journey to Work data accessed at: **www.transport.nsw.gov.au/data-and-research**

Photograph: Simon Freeman.

- Transport for NSW's Household Travel Survey accessed at: **www.transport.nsw.gov.au/performance-and-analytics/passenger-travel/surveys/household-travel-survey-hts**

[↗] **Online staff travel survey**

[↗] **Survey methods for organisations**

TIP Travel Plans work because they are tailored to the unique conditions of your organisation, so it is extremely important to identify what these conditions are.

It could be useful to undertake a simple Geographic Information System (GIS) mapping exercise – plotting home locations of employees alongside public transport access, walking and cycling routes. This will allow you to see at a glance how your employees are geographically distributed across NSW. It will also provide a broad indication of how well served each area is by different transport options.

After you have analysed the data available, use the results to form a picture of the 'problem' that will help to define your needs.

[↗] **Tips for analysing survey results**

Establish program management.

Secure senior management/executive support.

Agree the decision making framework:
- who will need to sign off on the Travel Plan?
- how will decisions be made?
- consider setting up information networks and a steering committee.
- Identify roles and responsibilities for Travel Plan development.

Identify resources (time, people, budget) for Travel Plan development.

Propose an overall time-line for Plan development.

Identify key internal and external stakeholders that need to be engaged throughout the planning process. Establish relationships with key stakeholders as early as possible. These may include:

- Company Director
- human resources team
- marketing department
- facilities management
- employees
- neighbouring businesses
- local transport operators

Organise meetings to share information and discuss the preliminary needs.

TIP A Travel Plan has a much greater chance of success if there is a single person or a team within an organisation responsible for the development and ongoing delivery of the Plan. This could be a full or part-time workplace Travel Plan coordinator or Transport Manager, an existing HR resource, Facilities Manager or Sustainability Officer, or a committed volunteer. Many organisations also engage external travel planning expertise.

Sample functions and skills of a travel plan coordinator

Engage stakeholders.

Engage with employees and stakeholders as early as possible and continue to engage throughout Plan development and implementation. Develop an engagement and communications plan to:

- inform about what is happening.
- encourage participation at all stages in the process.
- empower people with information about travel options.
- consult on what you decide to do. Be open and honest.

Implement awareness raising and marketing campaigns.

Potential engagement techniques

Some points to remember are:

- Try to address the 'What's in it for me' question to convince people to make changes to the way they travel. For example, giving staff flexibility around start and finish times can enable them to retime their commute for a better work life balance.

- Information alone is unlikely to be sufficient enough to deliver a change in travel behaviour; emotions and interest must be activated to generate change.

- Not everyone in the target audience will be ready to change their behaviour at the same time.

- Make changes predictable and gradual so staff can take the changes into account when making long-term plans.

- Change will not necessarily be lasting, it can revert back, so ongoing reinforcement is needed.

TIP Travel Plans are about impacting people's travel habits and encouraging changes in travel behaviour, so keeping people engaged sits at the heart of developing and implementing a successful Travel Plan.

B. Developing your Travel Plan

What needs will the Travel Plan address?

Now that you have gathered and analysed the information on the current situation, define your organisational needs based on your assessment.

Does your data confirm there is a problem or need to be addressed?

TIP Articulating the needs helps you engage confidently with employees and stakeholders.

Possible organisational needs that a Travel Plan can address are to:

- minimise negative transport impacts of the site / organisation
- maintain and improve viability of existing or proposed site
- relocate with minimal impact on staff retention
- ensure people feel safe, secure and well informed about travel to and from the site
- give employees more flexibility to choose how and when they commute

This can also lead to:

- improved position as employer of choice
- an active healthy workforce
- increased efficiency due to reduced time that staff spend travelling

It is also important to consider:

- How does a Travel Plan fit with the broader, long term organisational goals and business strategy?
- How does the Travel Plan fit with Local and State Government goals and strategies?

Using the Travel Plan Summary Template is a simple way of recording the following activities and presenting them in a simple format to your audience.

[↗] **Travel plan summary template**

Sample Travel Plan Summaries are also provided to assist you to fill the Template out correctly.

[↗] **Sample travel plan summaries**

[↗] **Considerations for hospital travel plans**

[↗] **Considerations for higher education institution travel plans**

[↗] **Considerations for large shopping centre travel plans**

What significant benefits will result from having a Travel Plan in place over the long term?

Articulate what outcomes you want to achieve from having the Travel Plan in place. At a high level, a Travel Plan is about delivering long term behavioural change and sustainable travel patterns.

There may be numerous outcomes you want to achieve that fall into several areas including:

- travel accessibility for employees
- workplace productivity
- employee travel safety and personal security
- employee health and wellbeing
- business improvements
- corporate sustainability

[↗] **Possible travel plan outcomes**

What measurable impact will the Plan have so that the outcomes are achieved?

Identify what impact is required to achieve the outcomes. Set performance indicators to measure progress towards achieving the impacts. They should include quantifiable results that you are hoping to achieve within a certain timeframe. For example, *"the use of public transport to increase by 10% in 3 years."* Be realistic about what can be achieved and over what time period.

The performance indicators should be based on:

- the results from your data analysis
- organisational goals
- the resources available
- suitable services and incentives

What products and services need to be delivered to achieve the impacts?

Consider what needs to be created to achieve the impacts and therefore the outcomes. Outputs can include:

- plans/reports
- brochures
- articles, presentations
- digital materials (websites, social media)
- events, workshops
- marketing campaigns
- networks
- policies
- incentives
- facilities
- infrastructure, etc.

Additional resources to help your organisation create sustainable travel behaviour change are available on the Travel Choices website at **www.mysydney.nsw.gov.au/travelchoices/resources** This includes specific resources to encourage staff to retime, remode, reroute or reduce their travel.

[↗] **Travel Choices Flexible Working Toolkit**

[↗] **Additional references**

What will be done to deliver the outputs? Who will do it?

Establish how the Plan will deliver the outcomes through a range of integrated activities. Travel Plans are all about influencing people's travel behaviour towards using more sustainable modes of transport, using a bespoke package of incentives and disincentives.

Successful travel plans often have 'hard' activities such as facilities and infrastructure, alongside 'soft' activities such as the provision of education, information, and marketing-based approaches.

Consider all transport elements:
- staff travel
- business travel
- clients, customers, visitors
- supplies and deliveries

Define timelines and identify who is responsible for delivery.

⬀ **Tips for designing your package of activities**

⬀ **Examples of 'hard' activities**

⬀ **Examples of 'soft' activities**

What resources are needed to conduct the activities?

Secure the human, financial, organisational and community resources needed to implement the activities.

Remember to cover off all the various kinds of costs involved:
- implementation costs – land, construction, vehicles for example.
- operating costs – cost of operating a bus service, security for accessing end of trip facilities, providing Opal cards for staff travel, or a new car park management system for instance.
- staff costs – people to coordinate, manage and monitor.
- ongoing maintenance and renewal costs.

TIP Travel Plans can be self-funding. For example, money raised from charging for car parking spaces could be allocated to developing other Travel Plan initiatives.

C: Monitoring and Reporting

Track progress, review and adjust when necessary.

Complete the Travel Plan template in **Appendix A** to present to stakeholders, both internal and external, for use in engagement and marketing with employees, students or customers, and to make tracking of impacts and evaluation of outcomes easier.

⬀ **Travel plan template**

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Review the Travel Plan every 12 to 24 months, usually via a travel survey and an overall assessment. To make valid comparisons between results, the travel survey should be conducted at approximately the same time each year, and the survey questions should not change significantly.

↗ **Travel plan review: tips timing and questions**

Report on progress. If the Travel Plan is a condition of consent it is recommended to check with the relevant planning authority to understand the reporting requirements. Planning authorities are likely to require evidence of a Travel Plan with regular reports on progress (typically annually).

Where can I get further information?

Additional information to help individuals, businesses and organisations create sustainable travel behaviour change is on the Travel Choices website. For a comprehensive suite of resources, case studies, tools and templates to help you develop your travel plan, visit **www.mysydney. nsw.gov.au/travelchoices/resources**

Resources available include:

Getting started
- Site audit checklist
- Transport and policy assessment checklist
- Open Data Hub and Developer Portal information
- Survey methods for organisations

- Online staff travel survey
- Tips for analysing survey results
- Sample functions and skills of a travel plan coordinator
- Potential engagement techniques

Developing your Travel Plan
- Travel plan template
- Travel plan summary template
- Sample travel plan summaries
- Considerations for hospital travel plans
- Considerations for higher education institution travel plans
- Considerations for large shopping centre travel plans
- Possible travel plan outcomes
- Tips for designing your package of activities
- Examples of 'hard' activities
- Examples of 'soft' activities
- Travel Choices flexible working toolkit
- Additional references

Monitoring and reporting
- Travel Plan review: tips, timing and questions.

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