



TRAVEL PLAN TOOLKIT

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EXECUTIVE SUMMARY


Summarise:

- what needs or issues the travel plan will address
- what significant benefits will result from having the travel plan in place over the long term
- what key activities will be delivered to help achieve the benefits
- how progress will be tracked
- how staff and stakeholders will be kept engaged.

Include a statement of executive/senior management support and commitment to the plan.

1. INTRODUCTION

1.1 What is a travel plan?

-  **For example:** A travel plan is a management strategy to bring about long-term behavioural change and encourage sustainable travel patterns. It's about understanding how people make transport decisions and using this to influence behaviour so you get better outcomes for your organisation, while reducing negative impacts such as congestion.

1.2 What needs will the travel plan address?



This could include:

- minimising negative transport impacts of the site/organisation
- maintaining and improving viability of the existing or proposed site
- relocation with minimal impact on staff retention
- ensuring people feel safe, secure and well informed about travel to and from the site
- giving employees more flexibility to choose how and when they commute
- enabling the organisation to sustainably expand.

This can also lead to:

- increased efficiency
- Improved standing as an employer of choice
- a more active, healthy and happier workforce.

1.3 Travel plan context

- i Outline the organisational context and the policy context for the travel plan. Explain how the travel plan fits with:
- the broader, long term organisational goals and business strategy
 - local and central government goals and strategy
 - the goals and strategy of other nearby organisations or precinct partners (if applicable).

2. CURRENT OR FUTURE SITUATION

2.1 Location and facilities



Describe your site, facilities and business including:

- number of staff
- number and type of people accessing the site(s) other than staff (e.g. patients and visitors, contractors, deliveries)
- nature of key business activities affecting travel
- description of the site(s) including a map showing locality, access roads and public transport
- a site plan showing car parks, access points and facilities such as cycle stands and end of trip facilities such as lockers and showers etc
- frequency of transport services to the site and any future changes expected to the transport network
- planned land use development
- access issues for those who may feel more vulnerable or who have mobility issues
- description of current or future facilities that encourage sustainable travel
- description of current or future site barriers to sustainable travel.

2.2 Current organisational policies affecting travel

- i Outline the HR policies and other business rules related to travel including car use and parking, vehicle lease schemes, working from home, and business travel arrangements, and any relevant salary packaging arrangements.

3. KEY INSIGHTS

3.1 Key findings and analysis

 **Present the key findings from your data collection (preferably as a graph or table), e.g.:**

- travel mode distribution
- travel origin, time and distance
- reported reasons for choice of travel mode
- reported barriers to sustainable transport
- reported incentives for change
- business travel data and costs.

Present analysis and key findings from the perspective of the organisational needs/goals of your travel plan.

Consider comparing your organisation's travel patterns to general patterns of travel across the country – see the Ministry of Transport Household Travel Survey  <https://www.transport.govt.nz/mot-resources/household-travel-survey/>

Consider doing a simple geographic information system (GIS) mapping exercise – plotting where employees live alongside public transport, walking and cycling routes.

3.2 Data collection methodology

i Describe how you collected data to get a robust understanding of how people travel to your site and the underlying reasons for that. Details could include:

- employee focus groups – outline how groups were formed, number of people involved, questions asked, etc
- organisational travel surveys – outline how the survey was distributed, and the number and percentage of returns etc (include a survey copy in the appendix).

4. TRAVEL PLAN MANAGEMENT AND ENGAGEMENT



Outline:

- roles and responsibilities for travel plan development and monitoring
- decision-making / governance framework
- steering committee details (if established)
- key internal and external stakeholders who helped develop the plan and how they will continue to be engaged
- list roles of any organisations outside of yours, e.g. bus operators, local government, neighbours etc.

5. TRAVEL PLAN OUTCOMES

 Be clear about the outcomes you want to achieve. These could include:

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

6. TRAVEL PLAN IMPACTS

- ① Set realistic, measurable performance indicators to track progress within a certain timeframe – e.g. 'increase the use of public transport by 10% in three years' or 'have working from home available one day a week for all staff by 2021'.


The travel plan summary will also include performance indicators for each individual activity.

7. TRAVEL PLAN OUTPUTS

- i Record the key products and services that need to be delivered.

Outputs could include plans/reports, brochures, articles and presentations, digital materials (websites, social media), events, marketing campaigns, policies, incentives, facilities and infrastructure.

8. TRAVEL PLAN ACTIVITIES

 Who, what, when – define what activities need to occur, who is responsible for delivering them and in what timeframe.

9. INPUTS AND TRAVEL PLAN RESOURCING

- i List resources (time, people, budget) for travel plan development. Identify any expected income from travel plan initiatives and where this income would be spent. Remember to cover off all the various kinds of costs involved. Sometimes costs can be offset through actions designed to change behaviour, e.g. funding staff Go cards through a car parking levy or using the levy to provide a free car wash for staff that car pool to work. You'll need to include:
- implementation costs, e.g. construction of end of trip facilities, or staff shuttles
 - operating costs – security for accessing end of trip facilities, providing Go cards for staff travel, or a new car park management system
 - staff costs – people to co-ordinate, manage and monitor, and develop communications material
 - ongoing maintenance and renewal costs
 - potential savings, if known.

10. TRAVEL PLAN SUMMARY

 Document how your organisation will deliver the individual activities that form the travel action plan.

| Identified needs Insert your organisation's identified needs here: | | | | | | |
|--|---|--|--|---|---|--|
| Inputs | Activities | | | Outputs | Impacts | Outcomes |
| What resources are required? | What | Who | When | What needs to be created? | Performance indicators | What will be achieved? |
| <ul style="list-style-type: none"> E.g. HR department staff resources | <ul style="list-style-type: none"> Develop flexible working policies – including working from home, flexible hours, hot desking, remote working etc. | <ul style="list-style-type: none"> HR department | <ul style="list-style-type: none"> October 2020 | <ul style="list-style-type: none"> Flexible working policy | <ul style="list-style-type: none"> 20% staff on flexible working agreements by July 2019 20% improvement in staff satisfaction surveys for health and wellbeing by 2020 | <ul style="list-style-type: none"> Improved health and wellbeing of staff Increase in productivity Organisational savings on office accommodation |
| <ul style="list-style-type: none"> Funds for shuttle bus | <ul style="list-style-type: none"> Arrange staff bus service linking to nearest public transport hub | <ul style="list-style-type: none"> Facilities manager Travel plan co-ordinator | <ul style="list-style-type: none"> Funding – within three months Operating – within six months | <ul style="list-style-type: none"> Shuttle bus | <ul style="list-style-type: none"> Reduction in vehicles arriving at site in peak by 20% by 2020 | <ul style="list-style-type: none"> Reduce number of vehicles arriving at the site during peak periods |
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11. MONITORING AND REPORTING

Outline:

- how the travel plan will be monitored (e.g. by using an annual travel survey)
- how progress against the travel plan will be reported and to whom (e.g. senior staff, board of directors)
- who is responsible for collecting data and reporting
- when the travel plan (in particular, activities and targets) will be reviewed and adjusted.

12. TRAVEL PLAN APPENDICES

- ① A travel plan is an iterative document and it is useful to attach and update supporting material to the travel plan as it is developed. Documents such as travel access guides, end of trip facilities maps and walking and cycling maps can be useful appendices to the travel plan.

