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# TRAVEL PLAN TOOLKIT

A full suite of templates and resources to help you prepare your Travel Plan  
is available online at: [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources)





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# CONTENTS

Introduction.....	2
The value of a travel plan .....	3
Value to your organisation and staff.....	3
The Travel Plan Cycle.....	4
How to develop a travel plan .....	4
Engagement is crucial throughout the development of your travel plan .....	5
Step 1: Agree what you want to achieve .....	6
Step 2: Build a picture of the situation.....	8
Travel survey .....	9
Step 3: Agree on the overall approach .....	10
Step 4: Design the package of measures.....	12
Step 5: Implement, monitor and review .....	16
Where can I get further information? .....	17

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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 can help you understand how your people make their transport decisions and can 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, consult with your relevant planning authority for advice on their requirements.

This toolkit provides the steps, templates and resources for developing your comprehensive travel plan. It is designed for the person or group responsible for developing and implementing a travel plan. It provides links to resources and more detailed information.

A full suite of resources are available at:

🌐 [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources) to help your organisation promote sustainable travel behaviour changes.

Please send questions or comments about using this toolkit to [transport@dcc.govt.nz](mailto:transport@dcc.govt.nz).







This suite of resources is developed with the assistance of Kate Mackay of Mott MacDonald, based on guidance produced for the 🌐 *Transport for New South Wales Travel Plan Toolkit* and for the 🌐 *NSW Premier's Council for Active Living Workplace Travel Plan guidance*.



# THE VALUE OF A TRAVEL PLAN

Travel plans work because they are evidence-based and tailored to the specific circumstances of an organisation or site. Every travel plan is unique. These plans lead to real benefits for your organisation, employees and the broader community by developing sustainable and commonly agreed solutions. Not all initiatives deliver the same benefits. See the below table for examples of potential benefits, depending on the initiatives implemented.

## Value to your organisation and staff

 Employee health	 Efficiency	 Cost reduction	 Sustainability	 Site development (if applicable)
<p>Generate an average of 20 minutes more exercise each day per person.<sup>1</sup></p> <p>Staff less likely to take sick leave.</p> <p>Staff are more productive.<sup>2</sup></p> <p>Contribute to improved workplace culture, morale and engagement.</p> <p>Improve work/life balance.</p>	<p>Improve reliability of staff arrival times.</p> <p>Improve reliability of deliveries.</p> <p>Reduce staff downtime spent travelling.</p> <p>Repurpose onsite car parking space.</p> <p>Provide better site access experience for employees, visitors and customers.</p> <p>Reduce local traffic congestion.</p>	<p>Reduce sick leave costs.</p> <p>Reduce parking costs.</p> <p>Reduce mileage claims.</p> <p>Improve staff recruitment and retention.</p> <p>Reduce travel costs for organisation and staff.</p>	<p>Encourage use of sustainable transport options.</p> <p>Improve your organisation's standing as an employer of choice.</p> <p>Improve your company image – environmental, corporate and social responsibility.</p> <p>Build community relationships.</p> <p>Contribute towards  <b>Green Star building rating.</b></p>	<p>Reduce development costs and potential to increase density (fewer parking spaces).</p> <p>Enhance attractiveness and marketability of site.</p> <p>Increase property and/or letting value.</p> <p>Easier pathway to development approval.</p> <p>Mitigate adverse traffic impacts.</p> <p>Improve community perception.</p>

<sup>1</sup>  <https://www.sciencedirect.com/science/article/pii/S0277953614002901>

<sup>2</sup>  <https://www.uk.mercer.com/content/dam/mercer/attachments/europe/uk/uk-2018-mind-the-productivity-gap.pdf>

# HOW TO DEVELOP A TRAVEL PLAN

While a travel plan could be developed in several ways, we suggest following the process outlined below. This is a proven method which has been used by many organisations to provide a structured approach to planning, implementation and evaluation.

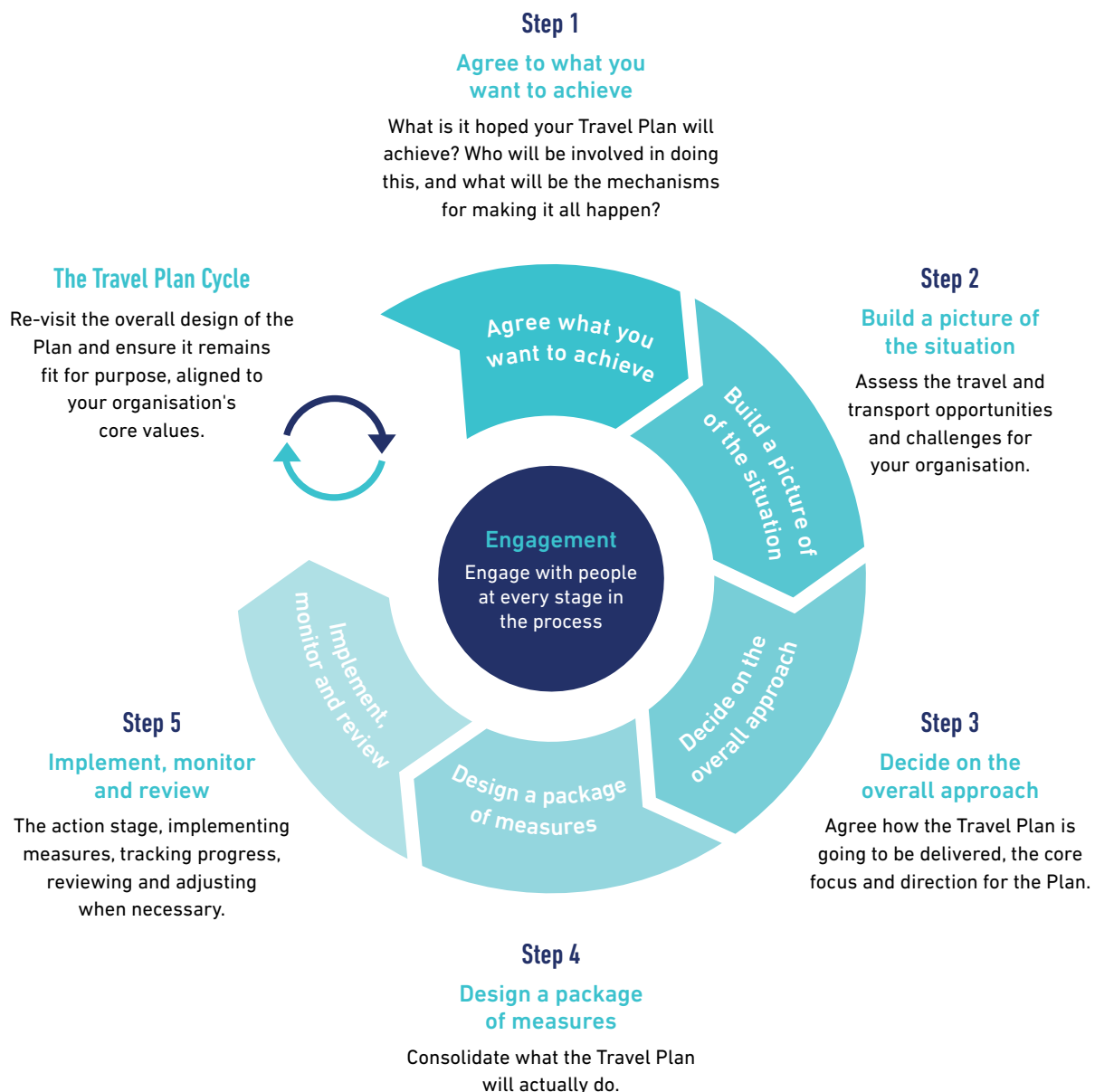


Diagram developed by Kate Mackay of Mott MacDonald for Transport for NSW

This process is based on established transport planning principles, and draws on the recommendations of the Australian Transport Assessment and Planning guidelines and the UK WebTAG guidance.



## Engagement is crucial throughout the development of your travel plan

Engagement with all stakeholders – your employees, your senior management and your external stakeholders – is critical to the success of your travel plan.

### Senior management support

The most successful travel plans are those with pro-active support from people at the highest level in an organisation. That support needs to be secured right at the start from the very top.

Once underway, regular briefings should be set up with key individuals to keep them informed and involved in the development and implementation of the plan. Use these meetings to begin a dialogue about resourcing – both the personnel and direct costs of travel plan initiatives.

The benefits of developing a travel plan for all stakeholders (refer to the 'Keep people engaged' Figure) can be used to secure support at all levels.

### Engage with your people

Travel plans are about supporting people to make changes to the way that they travel – retiming, remoding (using a different means of travel), rerouting or reducing their travel (the four Rs of travel behaviour change).

Engaging with employees as early as possible and continuing to engage throughout development and delivery of the plan is essential to its success and effectiveness. The more people know what you are doing, even at the very start of the planning stage, the more likely they are to be supportive. A successful travel plan is about participation not consultation.

It can be helpful to develop an engagement and communications plan to:

- Inform people about what is happening.
- Encourage participation at all stages in the process.
- Empower people with information about travel options.
- Consult on what you decided to do. Be open and honest.
- Implement awareness-raising and marketing campaigns.

See  [Potential engagement techniques](https://www.dunedin.govt.nz/travelplanresources) which can be found at [www.dunedin.govt.nz/travelplanresources](https://www.dunedin.govt.nz/travelplanresources)

### Some points to remember are:

- Always try and answer the 'What's in it for me?' question.
- Information alone is unlikely to be enough to deliver a change in travel behaviour; emotions and interest must be activated to generate change.
- Provide people the information and tools to make decisions themselves. This can be more effective than telling somebody what to do.
- Not everyone will be ready to change their behaviour at the same time.
- Support and encourage changes every now and again.
- Change will not necessarily be lasting. People can revert, so provide ongoing reinforcement.

**NOTE:** 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.



# STEP 1:

## AGREE WHAT YOU WANT TO ACHIEVE

The purpose of this first step in the process is to establish what your organisation wants to achieve with developing a travel plan. What does your organisation want to get out of this process? What will success will look like?

A travel plan is not an end in itself – it is only a tool for delivering sustainable travel behaviour change. The question is, to what end? Until there is some agreement on this, it will be difficult to know where to focus, what data to collect, and where to direct your efforts.

It can be helpful to think about this in terms of the goals and objectives for your travel plan.

**TIP:** Remember that a travel plan can address more than employees' commuting trips. It can also address travel during the course of the day for business purposes, visitor trips, deliveries and service trips.

### Goal/s

The goal or goals for your travel plan should be high level and aspirational. They should describe the fundamental outcome your organisation wants to achieve. Goals do not have to be transport specific. For instance, a goal could be 'to be a leader in sustainable travel', or to 'relocate with minimal impact on staff retention' or to 'be an employer of choice' or to 'have an active and healthy workforce'.

The following questions can help shape the conversation about goals:

- What are your long-term organisational goals and aspirations?
- What is the reason for thinking about a travel plan?
- What is hoped the travel plan will deliver?
- What are the priorities for the travel plan?

Agree that the goal of your travel plan is developed with the involvement of the people and stakeholders who will be instrumental in getting it off the ground. It is usually helpful to run a workshop, where you describe what a travel plan is and its potential benefits, then brainstorm the overarching reasons for developing one for your organisation. It can help to refer to your corporate strategy documents when doing this.

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

### Objectives

It can also be helpful to develop some specific objectives for your travel plan. These are just a more detailed explanation of your goals; they are statements about desired outcomes (not what you are going to do).

Below is an example of the objectives developed for the Optus Transport Strategy – one of the longest running and most successful workplace travel plans in New South Wales. The goal was to relocate with minimal disruption to the efficient operation of the company and staff travel' (reference 'Reflecting on ten years of the Optus Sustainable Transport Strategy, Mackay et al, 2017)

**Table 1 Optus Transport strategy objectives**

Objective	Detail
Security	To ensure staff (and visitors) have safe and secure access to the new site.
Accessibility	To ensure staff (and visitors) have good access to the new site via the transport networks. To provide good accessibility within and immediately around the new site.
Environmental	To reduce the environmental impact from transport within and around the new site.
Efficiency	To achieve the most economically efficient allocation of resources. To minimise congestion on and around the new site.
Equity	To ensure that all staff are treated fairly in terms of allocation of transport options.

Objectives should be chosen with a view to generate measurable targets and indicators, to ensure progress is monitored, for 'shouting' about the successes, and to adjust what is not working well if necessary.

See [PDF Possible travel plan outcomes](https://www.dunedin.govt.nz/travelplanresources) which can be found at [www.dunedin.govt.nz/travelplanresources](https://www.dunedin.govt.nz/travelplanresources).




## Identify internal resourcing

Now is a good time to identify roles and responsibilities and resources for travel plan development. Evidence has shown that a travel plan will have a much greater chance of success if there is a person or a team within an organisation charged with responsibility for the development, implementation and ongoing management of the Plan.

Depending on the size and nature of the organisation and site this could be a full or part-time workplace travel plan co-ordinator or Transport Manager, an existing HR resource, Facilities Manager or Sustainability Officer, or a committed volunteer. Many organisations also engage external travel planning expertise. In addition to the desirable skills listed below, it is important to ensure that the co-ordinator has sufficient decision-making authority within the organisation. It is important that the co-ordinator can make decisions or have sufficient sway, so decisions do not have to go through levels and levels of approval for anything to happen.

Desirable skills for a travel plan co-ordinator include the following:

- Willing to be a champion for the travel plan.
- Good numeracy skills and an ability to interpret data.
- Excellent interpersonal skills.
- Well organised.
- Marketing/market research/transport planning background.

See  [Sample functions and skills of a travel plan coordinator](https://www.dunedin.govt.nz/travelplanresources) which can be found at [www.dunedin.govt.nz/travelplanresources](https://www.dunedin.govt.nz/travelplanresources).

## Identify and involve internal stakeholders

The travel plan co-ordinator or manager will need organisation-wide support. Identifying the key internal decision makers, those who are responsible for budgets, is essential.

It may also be useful, or appropriate, to set up a steering group or committee to guide the overall shape and direction of the travel plan and provide support, or deal with roadblocks, when necessary.

Key internal stakeholders to involve might include the following:

- Company Director
- Human Resources Director
- Marketing Department
- Facilities Management
- Car park management company

## Agree a decision making process

Agreeing an efficient and appropriate decision-making structure and process will be equally important. Some decisions will be straightforward and have a low or neutral impact. Others may be more complex, directly affecting how employees travel or are able to travel, and some may have significant financial implications. For example – who will need to sign off the travel plan? Who can allocate budget spend?

## Engage with external stakeholders

The success of the travel plan will also be determined, to some extent, on factors outside of the direct control of the organisation. Contact and relationships should be established as soon as possible. Such stakeholders may include:

- Neighbouring businesses
- Local transport operators
- Landlord/Property Manager

## Propose a timeline

Although it may appear to be early days, now is the appropriate time to map out a timeline for your travel plan and highlight any key dates or holidays during the year. This could include events, board meetings, new or changed transport services. These dates should be identified so that events and launches and initiatives can be timed to avoid them.

It can also be helpful to identify opportunities for promotion opportunities and ensure these are reflected in the travel plan timeline.

For example:

- Aotearoa Bike Challenge – February
- Walk 2 Work Day – March
- World Health Day – 7 April
- Walk n Wheel Week – Term 1
- Car free day – 22 September

## STEP 2: BUILD A PICTURE OF THE SITUATION

Once a clear picture has been established about the focus of the travel plan (what you want to achieve), it is time to assess the travel and transport opportunities and challenges. This means working out what the problem is, and what is stopping you achieving your goal and objectives. This will need some collection of data.

This second stage is about assembling a resource of data to understand the 'how' and 'why' of travel to your site, and the opportunities and challenges.

Some technical support may be needed for this stage, especially for collecting and evaluating your transport data. It is very important to interpret the numbers correctly.

The data will form the basis of your travel plan development and design. Good baseline data collection will ensure your travel plan is tailored and appropriate to your organisation and offers an effective, value for money solution.

**Table 2: Baseline data collection for a workplace travel plan**

Understanding what you will need >>	Data which will inform this understanding >>	Data source/ collection method
Employee travel and transport-related attitudes, perceptions, motivations, issues, opportunities, barriers.	Responses from employees about travel/ transport, comments received verbally or written.	Focus groups/one-to-one meetings.
The workplace influences on employees' and visitors' travel choices	Public transport infrastructure provision on and around site. Workplace travel and transport related policies. Related Government policies.	Site audit Policy audit.
Patterns or trends in travel choices made by employees.	Where employees live in relation to transport infrastructure.	Employee home location data.
How employees travel to work, the 'mode share'.	Number and proportion of employee commute trips made by different types of transport.	Employee travel survey.
How employees' travel compares to others in similar and different locations.	Census journey to work data, and household travel survey data.	

### Focus groups/one to one meetings

Talking to people about their travel, their issues, their concerns, their likes and their dislikes, forms the first part of this data collection phase. What you learn about how people travel and the factors that influence travel choice will ensure your policy audit, site audit, and employee travel survey cover off the important and site-specific issues.

Depending on the size of your organisation, people can be engaged informally in discussions, or set up one or more focus groups.

A focus group is a structured group discussion with a small group of invited people, usually selected to represent a cross section of people in the organisation. It is a form of qualitative

research. The participants are engaged in an informal discussion around a particular topic or issue. The focus group is facilitated, and a discussion guide used to ensure topics are addressed.

Focus groups are a very effective way of getting a detailed understanding of the reasons behind people's travel patterns and travel decisions. They are a good way of exploring how people might react to future changes, and of getting people to trade off their opinions and views with others.

It is recommended to hold at least one focus group.

## Policy audit

The purpose of a policy audit is to capture any policy-related factors which may be influencing how people travel to your workplace.

Commonly, the way that people travel to work is affected by an organisation's policy on travel and transport-related factors, as well as government policies and procedures. For example, this can be whether the organisation offers free parking spaces to employees; whether it provides (or does not provide) spaces to park bicycles, with suitable end of trip facilities; whether discounted fares for using public transport are available to regular users; and whether it supports flexible working.

The policy audit should cover all current travel and transport-related policies of the organisation, consider any relevant Government-related policies, and also consider any proposed or future changes.

See  [Transport and policy assessment checklist](#) which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources).

## Site audit

The purpose of a site audit is to understand the physical issues of accessing your site which may be influencing people's commute travel choices.

It is now understood, for instance, that the reason many people will not use public transport is not a consequence of the characteristics of the public transport journey. Rather it is a consequence of the 'last mile' – the trip from the public transport stop to the destination.

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

Examples of issues that may be identified in your site audit which are known to encourage people to drive to work include the following:

- Lack of a safe pedestrian crossing point providing convenient access to bus or light rail stops.
- Lack of shade and/or rain protection on the pedestrian route from the public transport stop into your workplace.
- A longer walk into your workplace from public transport than from the car park.
- Lack of lighting at night time on pedestrian routes making staff feel unsafe.
- Surfacing of the pedestrian route unsuitable for work shoes.
- Frequency of transport services to the site and any future changes expected to the transport network.

Record this information to provide a summary of current travel opportunities and challenges. If barriers are identified to the use of sustainable means of travelling, use the travel plan to address these barriers.



The results of your site audit should inform the questions to be asked in your travel survey.

## Travel survey

The purpose of an employee travel survey is to understand how everyone in your organisation is travelling to work. The survey can also be designed to collect other data about work-related travel, visitor travel, and services and deliveries. The data analysis component of the survey results will identify trends, opportunities, barriers and potential solutions.

Travel survey data is essential for designing a good travel plan. A travel plan will only be effective if it is built on a robust understanding of how everyone in your organisation travels to work. It is essential to get as many people in your organisation to respond in full to the travel survey. If surveying everyone in your organisation using a self-completion survey, try and get at least 60% of your people to complete it in full. Everyone who does not complete a survey is someone that you know nothing about, and so cannot plan for.

 [Ministry of Transport household travel survey data](#)

See  [Staff travel survey template](#) and  [Survey methods for organisations](#) which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources)

## Analysing the results

Data analysis of survey results will help to understand trends in staff behaviour and key barriers or key opportunities to behaviour change (remode, reduce, retime or reroute). Data analysis should also enable a number of inferences to be identified and begin to guide the subsequent design and development of the approach and interventions of the Travel Plan.

It could be useful to undertake a simple Geographic Information System (GIS) mapping exercise – plotting anonymised home locations of employees alongside public transport access, walking and cycling routes. This will show how your employees are geographically distributed across Dunedin. It will also provide a broad indication of how well served each area is by different transport options. And it will give an indication of the potential to encourage people to switch to other modes.

See  [Tips for analysing survey result](#) which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources).



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## STEP 3: AGREE ON THE OVERALL APPROACH

### Review goals and objectives

The goals and objectives will have been established at the outset of developing your travel plan. It is important now, at this step in the process, to reflect on these goals and objectives based on what you now know about how your employees are travelling, and what is influencing them to make those travel choices – and make sure the goals and objectives are still appropriate. Now is the time to make refinements.

### Articulate focus of travel plan

Usually, there are a number of different ways in which the goals and objectives of a travel plan can be achieved. An unstructured approach to achieving them, something which incorporates a bit of everything, is unlikely to produce an effective or value for money travel plan. It will also be difficult to explain to people and difficult to get their buy-in and support.

It's important that the focus of the travel plan should consider the data gathered thus far, how far into travel planning the organisation is, and what it is the organisation wants to achieve.



A workplace travel plan, like any business plan, needs an agreed focus or a 'strategy'. You can think of it as the main thrust of your organisation's approach. You need to be able to explain in one or two sentences what it is the travel plan is going to do and how it will achieve the outcomes identified.

At its simplest, this involves the following:

- Identifying the 'big' issue that sits at the centre of the travel and transport related problem; if this is changed, it would impact nearly everything else.
- Creating a statement that describes 'this is what we are going to do' and 'this is how we are going to do it'.

While the choice of the overall focus of the travel plan may seem obvious, it is essential this is articulated and then agreed to by the key senior management and decision-makers.

The value of creating and agreeing a strategy is to have a concise and easily understood statement which everyone can

understand and can be used to frame all internal and external communications. It can explain easily and succinctly why the travel plan is focusing on some things and not on others.

Workplace travel plan strategies can:

- Create a more flexible workplace where people can choose where or when to work, with a working culture focused on outcomes.
- Price parking so that commuters with good access to public transport are discouraged from driving to work.
- Improve the public transport accessibility of the site by introducing a network of employee buses.

It is important to note that the strategy doesn't attempt to describe everything the travel plan will do. It is just the core direction of intent.

### Worked example of a workplace travel plan strategy

Goal	Objectives	Strategy
Enhance corporate sustainability position.	Reduce carbon emissions; <ul style="list-style-type: none"> <li>• reduce number vehicles arriving at site during peak period;</li> <li>• meet Sustainable Development goals.</li> </ul>	Encourage parking off-site, at park and ride sites in less congested areas with supporting quality travel direct to the workplace.

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# STEP 4:

## DESIGN THE PACKAGE OF MEASURES

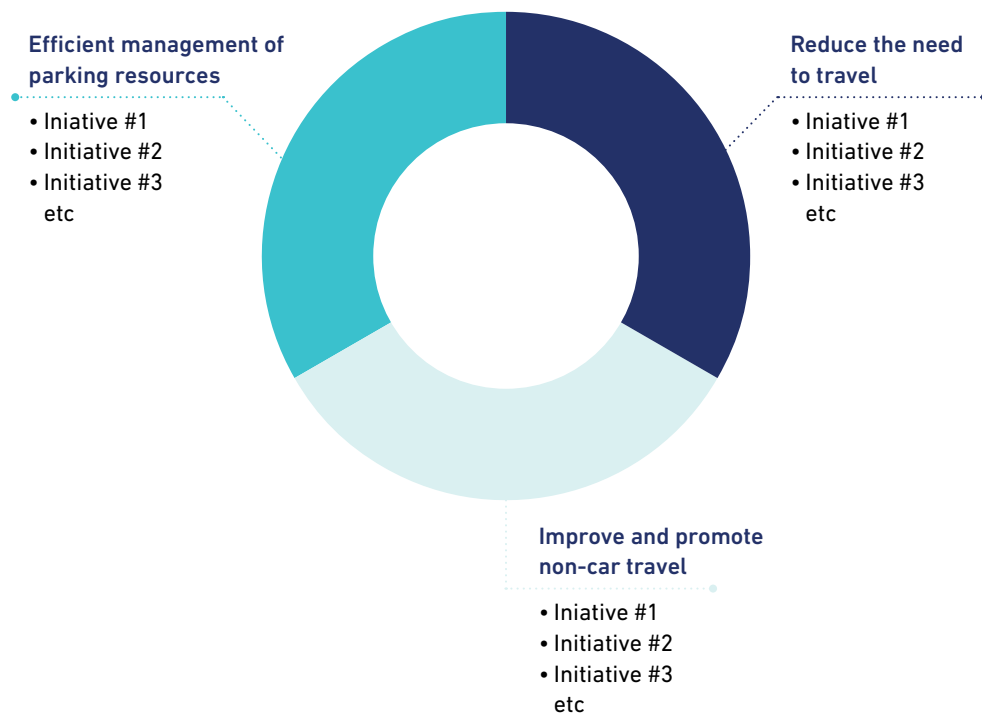
### Design framework

Travel plans are about influencing people's travel behaviour towards using more sustainable modes of transport, using a bespoke package of incentives and disincentives.

The success and effectiveness of workplace travel plans is primarily due to the way initiatives are packaged, integrated, work together, and how they reinforce and support each other. The sum of the whole is greater than the sum of the individual parts.

Travel plans are often designed around the three core themes, with multiple initiatives within each.

### Typical workplace travel plan framework



Depending on your goals and objectives, it can be important to consider all transport generated by your workplace or organisation. This includes:

- Staff travel
- Business travel
- Client, customer, and visitor travel
- Supplies and delivery vehicles.

### Select initiatives

The choice of initiatives must be informed by the previous stages in the travel plan process. It is vital that the initiatives chosen will deliver outcomes that will directly contribute to achieving the goals and objectives, and offer a value for money solution.

It can be very helpful to map out the whole travel plan story – to make sure there is a logical progression from beginning (what you want to achieve) to the end (how you are going to achieve it).



### Example framework for choosing travel plan initiatives

Goals	Objectives	Strategy	Initiatives
Healthier employees	Increased use of active travel by employees.	Use 'nudge' type initiatives to encourage personal social responsibility and lead to a change in behaviour.	Additional cycle parking spaces, lockers, showers and towel racks. Participate in Ride to Work day
Regarded as an employer of choice	Reduced staff attrition. Improved employee satisfaction.		Promote travel plan in employee recruitment material. Regular travel clinics on offer to assist with travel to work queries.

### Ensure good mix of travel plan initiatives


Successful travel plans include hard activities such as facilities and infrastructure and fiscal incentives, alongside soft activities such as education, information, and marketing-based approaches.

### Example workplace travel plan 'hard' and 'soft' initiatives

Example hard initiatives	Example soft initiatives
End of trip facilities for cyclists and pedestrians.	Information on the health benefits of walking and cycling promoted in employee newsletters.
Car parking spaces designated for car share and ride share users.	Employee membership of area-wide car sharing and ride share groups encouraged.
Provision of signage and wayfinding for pedestrian and cycling routes.	Walking meetings promoted.

Initiatives can also be categorised as 'push' and 'pull', meaning incentives and disincentives, often referred to as 'carrots' and 'sticks'. Good travel plans will be designed to gently push people away from single occupancy vehicle travel through a pricing signal or some other restraint, while at the same time making the alternative commuting options more attractive, so pulling them in the direction of more sustainable travel choices. Good travel plans will also have some 'quick win' initiatives, which can be implemented reasonably quickly and easily.

Consideration should also be given to low cost, innovative initiatives – often these are very effective. One such initiative is offering a bottle of cold water (in a reusable bottle of course) to people when they arrive at work.

See  [Tips for designing your package of activities](#) which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources).

### Set targets and indicators

The purpose of setting targets and indicators is to give a basis for monitoring and tracking progress. It is important that targets are not biased towards infrastructure solutions rather than non-infrastructure. 'Soft' measures such as perceptions and attitudes should be included. They must be realistic, and based on data and analysis.

### Indicators

Indicators are what needs to be measured and monitored, to be able to assess whether the objectives are being achieved.

Indicators can be classified as 'outcome' relating directly to the achievement of an outcome and its impact on the objectives; or they can be 'process', 'input', or 'output' objectives relating to actions taken or resources consumed and not the end result. Outcome indicators are the most informative and helpful; they are focused on measuring the effectiveness of an activity.

## Example workplace travel plan indicators

Outcome indicators	Process/input/output indicators
Proportion employees using public buses per day.	Number public bus services to workplace.
Number employees commuting to work by bicycle.	Funding per year to cycling initiatives.
Number of single occupancy vehicles arriving per day.	Number of parking spaces available to Single Occupant Vehicles.
Number of people regularly ride sharing.	Number people signed up to ride share website.
Proportion of employees arriving before AM peak.	Establishment of core meeting hours policy.

When deciding on your indicators, make sure there is access to the necessary data, or it can be collected in a cost effective and timely manner.

## Targets

Targets set the desired level of performance for a specific indicator. They should be measurable and realistic but challenging. If targets are too difficult to achieve, they may discourage rather than motivate. If targets are too easy to achieve, they may not be the motivating factor they should be.

Usually, targets will be associated with decreasing travel by single occupancy vehicles and increasing use of public transport, active transport, and shared transport. But this will depend on the objectives for your plan. The targets must relate directly to your objectives.

Targets should also be focused around outcomes (the travel behaviour change your organisation wants to see) rather than outputs (such as the number of bicycle parking spaces). The baseline data collected in Step three should be used to inform and shape the targets, and keep them realistic and achievable (recognising the resources available).

It is helpful and motivating to have some short-term, quick win targets (perhaps some output-type ones), and then the more fundamental outcome and longer-term targets.

It is important to be realistic what can be achieved and over what time. Embedding long term sustainable changes in people's travel behaviour takes time. Small changes in the overall way in which people travel are significant.

For instance, targeting a reduction of 5% in the proportion of people driving alone to work over five years (from 85% to 80%) would be a reasonably challenging target, particularly in the absence of any supply side measures such as upgrades to the public transport network.

Best practice suggests targets should always be SMART.



Specific



Measurable



Achievable and  
agreed



Realistic and  
relevant



Time-bound

## Example targets for a workplace travel plan

Decrease the proportion of employees driving alone to work from 80% to 75% in three years.

Increase the proportion of employees working from home at least one day a week from 2.3% to 5% by 2019, and 10% in by 2022.

Increase the average occupancy rate of employee vehicles used for commuting to work from 1.1 to 2.0 by 2020.

Increase the mode share of cycling to work from 0.2% to 1% in three years.

### Worked example of travel plan indicators and targets

Goals	Objectives	Strategy	Initiatives	Indicators	Targets
Healthier employees	Increased use of active travel by employees.	Use 'nudge' type initiatives to encourage personal social responsibility and lead to a change in behaviour.	Additional cycle parking spaces, lockers, showers and towel racks. Participate in ride to work day.	Proportion of employees commuting to work by walking and cycling.	Increase proportion walking to work from 0.2% to 2% in three years. Increase proportion employees cycling to work from 0.5% to 1% in two years.
Regarded as an employer of choice	Reduced staff attrition. Improved employee satisfaction.		Promote travel plan in employee recruitment material. Regular travel clinics on offer to assist with travel to work queries.	Annual employee satisfaction survey. Annual employee attrition rate.	Employee satisfaction increased from 90% to 95% by 2020. Attrition rate averaging 18% per year by 2022.

### Produce an action plan

The purpose of a travel plan action plan is to capture everything which needs to be considered in delivering the initiative; a day-to-day planning tool which the travel plan co-ordinator or manager can use. It is about making the travel plan operational.

The overall structure of the action plan should be as shown below.

#### Example workplace travel plan action plan structure

Initiatives	Indicators	Targets	Actions	Responsible	Delivery Date	Funding	Cost	Impact

The success of travel plan initiatives depends to a considerable extent on when they are launched – the delivery date. There are some common-sense rules which should be followed when considering delivery dates:

- Be realistic with timing.
- Communicate well in advance, and be open and honest about what is happening and when.
- Introduce 'carrot' initiatives before 'sticks'.
- Get someone within the organisation to try the initiative first and champion it.

Consider the climate and weather and try to ensure this will be supportive to the particular initiatives.

### Secure funding and resources

The amount of resources required to develop a workplace travel plan will vary from organisation to organisation. It will usually include the cost to fund one person at least part-time to manage the plan. It may also include costs for the marketing, engagement and initiatives. It is important to be realistic about what resources are available and choose the package of initiatives to ensure it can be delivered. It is important to appreciate the range of potential costs involved.

#### Potential workplace travel plan costs

Travel Plan co-ordinator	Baseline data collection	Capital Costs	Maintenance and renewal costs
	Analysis		
	Monitoring	Operating costs	Enforcement Costs
Involving people			

**Capital costs** could include construction of new end of trip facilities.

**Operating costs** could include the cost of operating a new employee bus.

**Ongoing maintenance and renewal** could include upkeep of new end of trip facilities.

**Enforcement costs** could cover car park management, use of ride share parking spaces.

Remember that travel plans can be self-funding, for example by levying a charge for car parking spaces and ring-fencing this (reallocating it) to fund travel plan initiatives. This can also help minimise negative reactions to the introduction of any charges.



# STEP 5:

## IMPLEMENT, MONITOR AND REVIEW

### Implement

Depending on the scale and nature of the travel plan, implementation should be reasonably straightforward if the step-by-step process has been followed.

Successful implementation of the travel plan will depend on the following factors:

- Keeping employees engaged and aware of the travel plan.
- Transparency and honesty in all communications with employees.
- A dedicated resource responsible for the travel plan.
- Secured funding and resources.
- Continuing support from senior management.
- Robust baseline data and data analysis informing all decision-making.
- Ongoing review of effectiveness of initiatives and perceptions of the travel plan.
- Reviewing successes and the not so successful.
- Reporting of progress to internal and external stakeholders.

### Monitor and review

Monitoring and review is an essential element of implementing the travel plan and should be built into the overall structure of your plan.

Plan to review the travel plan every 12 to 24 months and report on progress. Review data should ideally include a travel survey and overall assessment. To ensure valid comparisons between results, carry out the travel survey at around the same time every year. Survey questions should not change significantly.

See  [Travel plan review: tips timing and questions](#) which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources).

There are two elements to monitoring and reviewing.

The first is the process of collecting the data for the 'indicators', to evaluate progress towards meeting the targets.

### Example of a workplace travel plan monitoring framework

Indicator	Target	Monitoring – source/s	Monitoring – frequency
Number of employees driving to work in single occupancy vehicles per day.	Decrease the proportion of employees driving alone to work from 80% to 75% in three years.	Employee travel survey.	Annual.
		Spot counts of employees entering car park.	Random checks, daily.
		Number employees regularly sharing a ride to work.	Monthly.


The second is a more holistic evaluation of progress towards the goals and objectives of the travel plan, where necessary leading to a review or revisit of analysis and considerations undertaken previously.

A travel plan is designed to be dynamic, to be iterative, and to be adjustable to the changing circumstances of your employees, your site, and the transport infrastructure available. Ultimately it should become part of business as usual for your workplace.

### Report on mode share change

Care should be taken when setting, and reporting on, mode share targets. Generally, the change in overall mode share should be used, not the change within one mode share.

For example, public transport mode share for the commute to a workplace may be 5%. In other words, assuming a workplace population of 100, five people use public transport. If this increases to 10 people (10%) the correct way to report this is to say that the public transport mode share has increased by 5%. Given the small numbers, it can be misleading and give a false sense of scale to say that the public transport mode share has increased by 50%.

This holistic review should be undertaken twice a year. Issues to be considered are outlined in the  [travel plan review: tips, timing and questions](#) document which can be found at [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources).

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# WHERE CAN I GET FURTHER INFORMATION?

Additional information to help individuals, businesses and organisations create sustainable travel behaviour change is on the DCC website.

For a comprehensive suite of resources, case studies, tools and templates to help you develop your travel plan, see [www.dunedin.govt.nz/travelplanresources](http://www.dunedin.govt.nz/travelplanresources)

These include the following:

## Getting started

-  [Site audit checklist](#)
-  [Transport and policy assessment checklist](#)
-  [Survey methods for organisations](#)
-  [Staff travel survey template](#)
-  [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 shopping centre travel plans](#)
-  [Possible travel plan outcomes](#)
-  [Tips for designing your package of activities](#)
-  [Examples of hard measures](#)
-  [Examples of soft measures](#)
-  [Guaranteed ride home programme template](#)

## Monitoring and reporting

-  [Travel plan review: tips, timing and questions.](#)


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