

PUBLICLY AVAILABLE SPECIFICATION

PAS 500:2008

National specification for workplace travel plans



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Foreword

This Publicly Available Specification (PAS) has been sponsored by London European Partnership for Transport (LEPT), supported and funded by Transport for London (TfL) in collaboration with The British Standards Institution (BSI). Acknowledgement is given to the following organisations that were consulted in the development of this specification:

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- Welsh Assembly Government

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Introduction



Background

The Eddington Report [1] on transport carried out for the UK government emphasized the clear links between a high performing transport system and sustained economic prosperity. It argued that a 5% reduction in travel time for all businesses and freight travel on the roads could generate around £2.5 billion of costs savings – some 0.2% of GDP.

Eddington also argued that if left unchecked, the rising cost of congestion would have a considerable impact on the UK economy, for example it is estimated that it would waste an extra £22 billion of time in England alone by 2025. By this date 13% of all traffic will be subject to stop-start travel conditions.

Finding ways to make the best possible use of transport infrastructure and minimizing loss of time and economic damage is a clear priority and an activity

that all businesses and sectors of the economy can engage in.

Travel plans offer one proven methodology for bringing about this change. The UK Department of Transport has concluded that, on average, travel plans can reduce the number of single-occupancy vehicle trips to a destination by 18% (Smarter Choices [2]). Reductions in traffic levels of this magnitude at peak time can make a huge difference to easing traffic flows, increasing the reliability of journey times and improving the commuting experience. Travel plans are specifically recommended in Planning Policy Guidance 13: Transport [3]

The King Review [4] reiterated the recommendation in the 2004 White Paper that all government departments should reduce car commuting by 5% by 2006.

What is a travel plan?

The original concept of travel planning came from the private sector in response to business pressures and have matured considerably since they first appeared in the UK in the early 1990s. They now provide a coherent approach to transport management that brings benefits to commuters, business travellers, businesses and the urgent need to address climate change, congestion and air pollution problems.

A travel plan is a long-term management strategy for an organisation and its various sites or business park that seeks to deliver transport objectives through positive action and is articulated in a document that is regularly reviewed.

What are the benefits of a travel plan?

Workplace travel plans (WTP) generate benefits to the business, the local economy, the individual members of staff, the community, the environment and increase the quality of life for all those who live and work in the area or location addressed by the travel plan. Businesses benefit by reducing expenditure on car parking and travel in course of work and through being able to release land allocated for car parking for more productive core-business purposes.

In addition, there is well documented evidence that staff who walk and cycle occasionally and embrace “active travel” are healthier, have reduced incidence of cardiovascular disease, have fewer days off work and are more productive. These benefits accrue to both individuals and organisations and assist recruitment and retention and the reduction of turnover rates. WTPs are a key element in healthier workplace policies and in dealing with the obesity epidemic now hitting the UK. Active travel makes a substantial contribution to reducing obesity and reducing early onset diabetes.

Reduced car use to a particular site feeds directly to reduced air pollution which can assist in delivering compliance with air quality management objectives and reduces greenhouse gases allowing both companies and local authorities to deliver reductions in greenhouse gases in line with statutory objectives set out in the Climate Change Bill.

Reducing congestion is a headline objective for local and central government and is of great value to businesses in reducing time and monetary penalties as a result of delays caused by congested traffic. Reducing numbers of vehicles will also benefit road safety objectives and increase the attractiveness of



walking and cycling through its impact on creating safer conditions for these sustainable modes. Travel plans make a substantial contribution to widening social inclusion and enabling many more people than is currently the case to gain access to jobs, training and education and the ability to make contact with these facilities without a car is of great value to those groups who are traditionally excluded from wider participation in social, educational and work opportunities.

NOTE More information on the role of transport improvements in promoting social inclusion can be found in "The value of new transport in deprived areas. Who benefits, how and why?" [5]

What can a travel plan cover?

A travel plan typically focuses on journeys to and from a site made by staff and visitors of all types, but often includes business travel, fleet activities and the delivery of goods, supplies and services.

It should establish a structured strategy with clear objectives and targets, supported by suitable policies and quality measures for implementation. It is a continuous process for improvement, requiring monitoring, review and revision to ensure it remains relevant to the organisation. These aspirations and actions should be documented in a travel plan. The structure and content of such a document will depend on a range of factors, including the location of the site to which it relates, the nature of the development and of the occupier and end users.

[Guidance for workplace travel planning for development [6]]

Requirements regarding the nature and content of the travel plan, are provided in **Clause 3**.

A WTP is traditionally organisationally based. This means that the travel plan would be owned by the local authority, university, hospital, business etc and would apply to the staff of that single organisation. In recent years travel plans have developed so that a group of organisations on a business park (for example) would co-operate to share ideas, budgets and bring about target modal shift. Airports are special cases where considerable work has been done across hundreds of individual organisations to bring about modal shift.

Organisations frequently have many sites. This is especially the case for local authorities, universities and NHS trusts. In these cases a travel plan should be developed and owned by the organisational body



responsible for corporate decisions and budgeting and should apply to all sites within that organisation (see 3.1), taking into account the unique characteristics of each constituent site.

For the purposes of a WTP, "site" means any location where the organisation carries out any of its activities (see 2.9). Some organisations operate over 250 sites and a WTP under these circumstances would have to be very clear about its organisational wide impact and its relevance to every site within that organisation.

Travel plans can form part of a wider menu of transport interventions and are often referred to as a specific example of Transport Demand Management (TDM) or Mobility Management. Both TDM and Mobility Management are defined in the glossary (see Annex A).

Annex B contains further information on travel plans and sources of information that will be useful to those involved with travel plans.

PAS 500 is intended to improve the quality and consistency of the WTP. It does not supplant or replace local authority guidance on travel plans or Transport Assessments and does not supplant any part of the development control process which will often impose travel plan conditions on applicants for new developments.

DfT has published *Guidance on Transport Assessments* [7]

A Transport Assessment is intended to assist developers proposing a new development to assess and manage the transport impacts of that development. Those who are involved in producing travel plans for new developments should follow this guidance and make sure that the travel plan is an integral part of the travel assessment process and is consistent with the requirements of the local planning authority.



1 Scope

This Publicly Available Specification (PAS) defines requirements for developing and implementing a workplace travel plan (WTP), including public availability, resources and claims of conformity.

It is intended for use by any organisation planning or developing WTPs and applies to all WTPs and all the situations in which WTPs are initiated, developed and implemented. This includes (but is not limited to) WTPs:

- initiated as part of an organisational policy to manage transport impacts for the benefit of staff, the environment, corporate social responsibility, the reduction of congestion, the better management of parking and to foster good relationships with neighbours;
- submitted with planning applications and/or transport assessments as part of the development control process;
- designed to reduce pollution from motor vehicles as part of an air quality strategy.

PAS 500 is applicable in all situations where the term “travel plan” is likely to be used and is deemed relevant to all those involved in the travel plan process including but not limited to:

- managers charged with transport and parking responsibilities;
- planners in local authorities;
- consultants;

- transport, traffic, planning, architectural and engineering consultants advising on transport impacts and plans designed to reduce the need to travel;
- transport demand management staff in central and local government;
- developers bringing forward plans for new developments or changes to existing developments likely to result in traffic generation and impacts;
- public transport operators interested in attracting customers presently using cars;
- cycle planners and pedestrian planners interested in increasing the use of these modes of transport;
- campaign groups;
- urban designers and architects seeking to create attractive environments with less traffic and a greater reliance on walking and cycling and public transport.

This PAS applies to all the main components of transport generated by a particular site. These include:

- commuter trips made by staff;
- trips made by staff in undertaking their duties or otherwise in relation to their work;
- visitors to the site e.g. patients and visitors to hospitals, clinics and other NHS facilities, local residents visiting council offices, suppliers or customers making trips to businesses;
- contractors involved in carrying out projects at a



particular site e.g. building and construction, catering and cleaning;

- students travelling to university and college campuses and sites;
- trips made by all those carrying out work related tasks at premises covered by the travel plan (e.g. servicing plant and equipment, delivering supplies);
- trips made by delivery vehicles of all types where the delivery is directly the result of demands made by the site to which the travel plan applies.

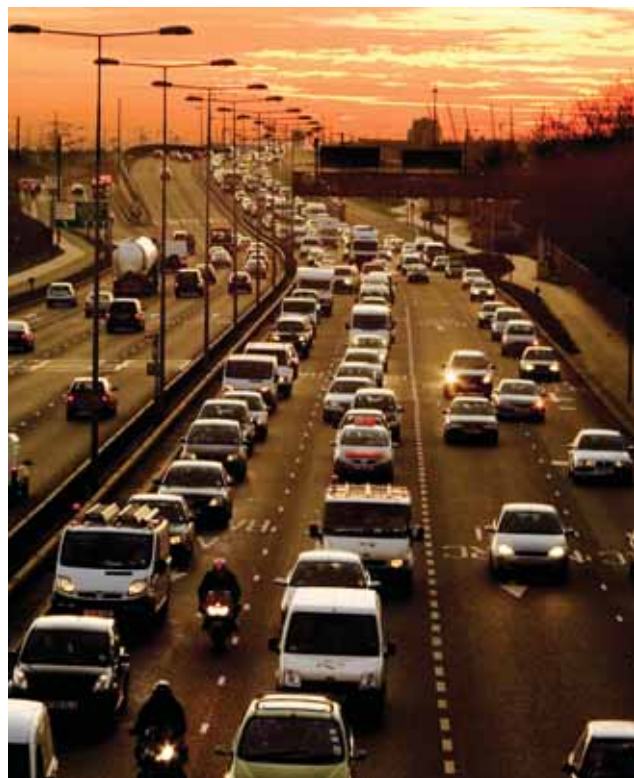
This PAS provides valuable requirements for organisations of all sizes but would be of particular use to workplaces or groups of organisations with more than 100 employees.

This PAS does not cover:

- the design of attractive walking and cycling facilities;
- public or private bus, coach and train operations;
- the design and operation of public transport services;
- the detailed design and operation of car share and car club schemes.

It does not specify detailed measures or interventions that are likely to succeed in reducing car trips.

This PAS does not establish specific targets, objectives or outcomes.



2 Terms and definitions

For the purposes of this PAS the following terms and definitions apply.

NOTE An additional glossary can be found in *Annex A* which aims to provide more in-depth explanations of some of the key aspects of WTPs.

2.1 aim

intention or purpose of an organisation or activity

2.2 alternative mode (of transport)

means of transport, the availability of which, reduces reliance on cars

NOTE These can include walking, cycling, public transport, motorcycles, mopeds, car share and/or car clubs, carpooling etc.

2.3 dot-map

visual representation of the area in which the site under discussion is located which shows the main roads, railway lines and station and any other public transport facilities and a dot representing each member of staff working at that site

2.4 intervention

specific, planned, timed and co-ordinated action designed to produce changes in travel behaviour in line with the aims and objectives of the travel plan

2.5 objective

goal intended to be achieved

2.6 organisation

entity (e.g. company, corporation, firm, enterprise, authority or institution, or part or combination thereof, whether incorporated or not and whether public or private) that has its own identity, functions and administration

NOTE Where organisations operate from more than one site, the organisation is made up of all sites.

2.7 outcome

change in modal split

2.8 output

measure to be implemented

2.9 site

premises at a specific geographical location which, either individually or combined, form part of an organisation

NOTE This can include business parks.

2.10 SMART

specific, measurable, achievable, realistic and timebound

2.11 transport demand management (TDM) staff

employees with skills in transport demand management, including transport planners, travel planners/coordinators and those involved in developing smarter choices and for whom travel plans form a key part of their work

NOTE These could include facilities managers working in HR, environmental etc.

2.12 workplace

specific geographical location to which employees, visitors and others travel

NOTE 1 This covers a wide variety of destinations with substantial commuter, visitor, student and/or user flows e.g. hospitals, clinics, universities, colleges, offices of all kinds, business parks, town halls, government departments and manufacturing facilities.

NOTE 2 Separate guidance and best practices exists for schools and residential locations and they are not included in the PAS 500 definition of a workplace.

2.13 workplace travel plan (WTP)

long-term management strategy for an organisation(s) and or an area(s) that seeks to deliver sustainable transport objectives through action and is articulated in a document that is regularly reviewed

[Guidance for workplace travel planning for development [6]]



3 The workplace travel plan process

3.1 General

Organisations developing WTPs for which conformance with this PAS is to be claimed shall ensure that those plans are aligned with the long-term management strategy of that organisation, contributing to the delivery of high level objectives for the organisation as a whole.

A single organisational travel plan can be implemented irrespective of the number of sites occupied by that organisation. However, that organisational travel plan shall specify how implementation is to be achieved, on each site (see Introduction – What can a travel plan cover?).

The process for the design, development and implementation of any WTP shall be configured into the areas of activity illustrated in Figure 1 (for existing sites) and Figure 2 (for new sites). The plan shall reflect the decisions and outputs from all development areas and shall document the steps taken to meet its objectives.

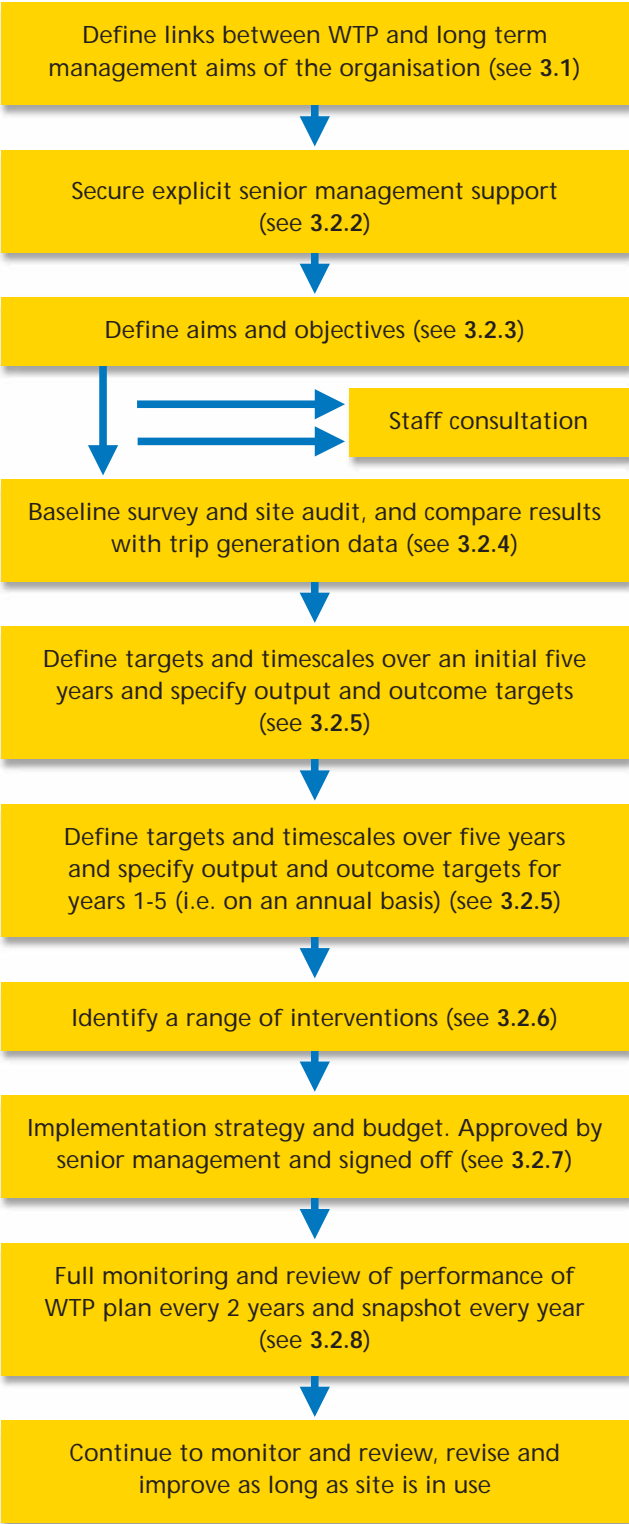
3.2 Existing sites

3.2.1 General

The organisation responsible for the design, development and implementation of a WTP for an existing site, for which conformance with this PAS is to be claimed, shall ensure that all the activity stages identified in Figure 1 and specified in 3.2.2 to 3.2.8 are included.



Figure 1 Activities to be undertaken for a travel plan for an existing site (voluntary travel plans)



3.2.2 Senior management support

The WTP and its implementation strategy shall have documented support from senior management.

This support shall be reaffirmed at appropriate milestones throughout the project e.g. budget allocation.

3.2.3 Defining aims and objectives

This section of the travel plan shall identify both the benefits that the travel plan will deliver and the issues which it is intended to address. These shall be set out as aims and objectives.

3.2.4 Measuring baseline travel behaviour

This section of the travel plan shall describe the organisation's travel survey design, methodology and execution and compare site specific results with trip generation data (such as census, National Travel Survey, trip generation databases, travel plan monitoring data etc). It shall detail the results of consultation with staff and relevant groups (e.g. visitors, students) to establish a deeper insight into the nature of the problems and the range of interventions that are likely to be effective in achieving targets. It shall include an

assessment of possible interventions and measures based on evidence from the smarter choices literature and from staff and other user groups, followed by an action plan selecting appropriate interventions.

Surveys shall be designed and carried out in line with the requirements in **Annexes C and D**.

NOTE Annex B provides a list of sources of information on interventions and measures and the smarter choices agenda.

3.2.5 Defining the targets to be achieved and the associated timescales

This section of the travel plan shall include specification of output and outcome targets (see 2.7 and 2.8) and set out the action to be taken to achieve those targets. The actions identified shall be SMART (see 2.10) with unambiguous requirements for monitoring and reporting. The targets shall be clearly broken down for years one through to five.

NOTE 1 The targets and associated timescales should reflect industry good practice in consultation with the local planning authority.

NOTE 2 Annex E provides sources of information and examples of target setting.



3.2.6 Identify a range of interventions

The WTP shall identify a range of interventions.

NOTE The output of a WTP is the list of practical, deliverable, funded interventions that will deliver the targets and objectives. The DfT guidance documents listed in Annex B provide detailed information on what should be considered for inclusion in this list of interventions and those responsible for developing travel plans are strongly advised to investigate all possible interventions as part of the process of determining site-specific and organisationally relevant prioritized interventions.

3.2.7 Implementation strategy and budgetary resources

This section of the travel plan shall include the implementation strategy for the first five years of the travel plan. The travel plan shall include evidence that the budgetary requirements of the implementation have been fully investigated and that sufficient resources have been allocated. Budget information and staffing inputs shall be explicitly included in the WTP documentation.

WTPs with adequate budgets and appropriately trained and experienced staff are more likely to be successful. It will be up to each organisation designing and submitting a travel plan to determine what is appropriate for staff and budgets. However, there shall be sufficient information available to give confidence

that the WTP is adequately resourced and that these resources are commensurate with the number and variety of the interventions proposed in the travel plan.

NOTE Communication with staff and visitors is a key element of a WTP and the active, well-informed participation of staff at an early stage is a good predictor of travel plan success. Resources should be deployed in such a way that staff are actively informed, involved and see themselves as full partners in the development of a travel plan.

3.2.8 Periodic review

The WTP shall be reviewed annually and progress towards targets reported. Every five years there shall be a major review of the aims, objectives, targets and budgets to ensure that the WTP is still relevant to local organisational and geographical circumstances. The annual and five yearly reviews shall continue to be carried out as long as the site is a travel destination.

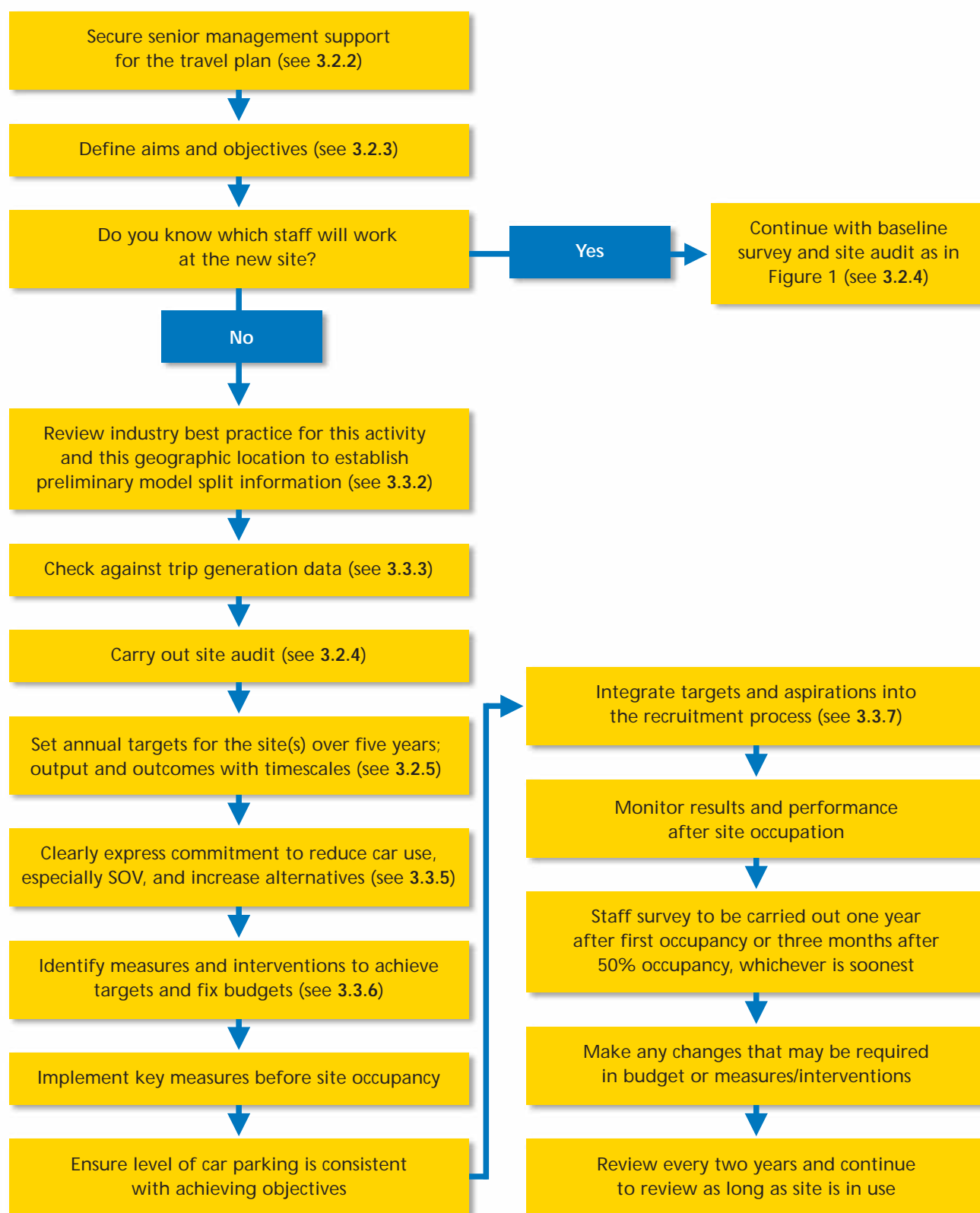
3.3 New sites

3.3.1 General

The organisation responsible for the design, development and implementation of a WTP for a new site, for which conformance with this PAS is to be claimed, shall ensure that all the activity stages identified in Figure 2 and specified in 3.3.2 to 3.3.8 are included.



Figure 2 Activities for a travel plan for a new site (planning obligation and planning related)



3.3.2 Establishing preliminary modal split information

A WTP for a new site shall make reference to good practice examples in the UK (see **Annex B**) to provide a clear picture of what the travel plan can achieve in the location type.

NOTE When estimating possible outcomes from the WTP it should be assumed that WTPs will be effective and that significant improvements in the use of walk, cycle, public transport and car share can be achieved when compared to regional averages obtained from the National Travel Survey or similar sources of transport statistics.

3.3.3 Trip generation data

Trip generation data (e.g. TRICS and TRAVL) shall be utilized to provide an evidence base in support of travel behaviour and modal choices in the UK.

NOTE 1 There should be a presumption that a well-founded travel plan can improve on situations that have been in place for more than three years.

NOTE 2 Airports are not represented in trip generation databases. In these cases judgements will have to be used to assess the relevance of these databases for specific classes of use e.g. the retail or office functions located on an airport site.

3.3.4 Site audits

A WTP shall include a site audit which meets the requirements given in **Annex C**.

3.3.5 Commitment

A WTP for a new site shall clearly express commitment to reducing single occupancy car use and increasing the use of more sustainable alternatives travel and working arrangements.

NOTE There are two sources of baseline data for a new site and both can be used to provide a benchmark against which reductions in SOV use can be measured. The first is travel data. The National Travel Survey and national transport statistics both published by DfT give regionally specific modal split data for the journey to work. This can be used as a benchmark. The second source is already existing travel plans. Existing travel plans should be used as comparators to give an indication of what can be achieved over what timescale in the percentage of trips that are SOV trips.

3.3.6 Measures and interventions

The WTP shall identify a range of interventions.

NOTE The output of a WTP is the list of practical, deliverable, funded interventions that will deliver the targets



and objectives. The DfT guidance documents listed in **Annex B** provide detailed information on what should be considered for inclusion in this list of interventions and those responsible for developing travel plans are strongly advised to investigate all possible interventions as part of the process of determining site-specific and organisationally relevant prioritized interventions.

3.3.7 Integration of targets and aspirations into the recruitment process

The targets and aspirations of the travel plan shall be integrated into the recruitment process for staff at the new site so that prospective staff can form a clear view on the importance of changing travel behaviour in favour of walking, cycling, car sharing, public transport and alternative working practices (as appropriate).

The WTP shall set out in detail, the package of benefits and recruitment incentives to be offered to prospective staff including discounted public transport offers and other physical and fiscal measures by means of which sustainable transport choice is to be rewarded. The WTP shall also include identification of the means whereby this information is to be made known to prospective staff.

3.3.8 Site design

The configuration of new sites shall be included in the development of WTPs as soon as the relevant information becomes available.

NOTE 1 A travel plan retro-fitted on a site with large areas of car parking and little thought for the ways in which cyclists, pedestrians and public transport users can be prioritized through physical design is unlikely to be successful. A site that gives physical expression to the prioritization of walking, cycling and public transport users will have a much better chance of supporting a higher modal share for these users than would otherwise be the case.

Design guidance on these principles can be found in *Shaping neighbourhoods*. A guide for health, sustainability and vitality [8].

Guidance on cycling can be found in the *Nottinghamshire County Council Cycling Design Guide* [9] and *Design Standards* [10] produced by TfL.

Guidance on walking and pedestrian facilities can be found in *Pedestrian planning and design guide – The pedestrian network planning process* [11].

NOTE 2 Those involved with developing new sites should instruct appropriate professional groups (e.g. architects) to produce designs that enhance and celebrate walking, cycling and public transport use.

4 Archiving and public availability

The WTP shall be made available (in a range of formats including, electronically) upon request by interested parties. This may be in a version from which information judged to be commercially sensitive has been removed.

NOTE It is expected that the availability of this PAS will improve the consistency and quality of WTPs and that an increase in their general availability will accelerate the learning process and the dissemination of good practice.



5 Classification grades



5.1 General

This PAS provides for three grades of conformance, Bronze, Silver and Gold. The requirements for each grade are given in **Clauses 5.2, 5.3 and 5.4**, respectively. A matrix of these requirements is given in **Annex F**.

5.2 Bronze grade

5.2.1 Organisations having WTP(s) for which conformance with the bronze grade for PAS 500 is claimed shall ensure that the WTP meets the requirements given in **Clauses 3 and 4** together with those in **5.2.2 to 5.2.6**.

5.2.2 The WTP shall demonstrate that budgetary requirements have been fully investigated and sufficient budget and resources have been allocated to achieve the defined objectives.

5.2.3 The WTP shall be based on a survey, undertaken and analysed to identify the travel behaviour of existing/proposed staff and visitors. Where the survey has been undertaken for new sites, it shall be based upon evidence from secondary sources showing geographically relevant travel choices for the journey to work and travel in course of work.

5.2.4 The WTP shall identify a director/senior manager as holding overall responsibility for the travel plan strategy, its implementation and progress and for the individuals appointed to implement the plan.

NOTE 1 *The identified director/senior manager and the implementer(s) of the travel plan can be the same person.*

NOTE 2 *The appointed individual should be given the opportunity to undergo training in travel planning and associated issues.*

5.2.5 The WTP shall include an implementation strategy giving clearly defined targets and milestones covering at least five years.

5.2.6 The WTP implementation plan shall include a marketing and communications strategy covering at least five years.

5.3 Silver grade

5.3.1 Organisations having WTP(s) for which conformance with the silver grade for PAS 500 is claimed shall ensure that the WTP meets the requirements given in **Clauses 3, 4 and 5.2** and that those set out in **5.3.2 to 5.3.8** are also met.

5.3.2 The detail of the WTP survey (5.2.3) including questions, results and the process of analysis to identify how the results will be used to achieve the travel plan objectives, shall be published.

5.3.3 The WTP targets specified for the first year shall have been achieved or where not achieved the requirements of 5.3.4 shall have been implemented,

5.3.4 Where a review of WTP targets is found to be necessary, the reasons for undertaking the review, detail of its findings and its outcomes shall be clearly documented and made available on request together with any supporting evidence, external to the review.

5.3.5 Implementation of the WTP shall have resulted in an increase in the use of alternative travel/work practices and a commensurate reduction in the proportion of SOV trips (see A.4) and evidence supporting this shall be made available.

NOTE *The reduction in SOV trips need not apply to organisations with an SOV mode share of less than 5%.*

5.3.6 A response rate of at least 30% of employees shall be achieved on the travel survey (see 5.2.3).

5.3.7 Evidence shall be available that the detail of the WTP and the full list of measures in place to achieve WTP objectives have been communicated to all staff and remain available on request.

5.3.8 Evidence shall be available that staff members responsible for the implementation of the WTP have

undertaken training on travel planning and/or its associated issues.

5.4 Gold grade

5.4.1 Organisations having WTP(s) for which conformance with the gold grade for PAS 500 is claimed shall ensure that the travel plan meets the requirements given in **Clauses 3, 4, 5.2, 5.3** and that those set out in 5.4.2 to 5.4.6 are also met.

5.4.2 The WTP shall have been in operation for at least five years.

5.4.3 A survey undertaken in accordance with the specification provided in **Annexes C and D** shall have been undertaken at the end of year five and the results published.

5.4.4 The survey undertaken in response to the requirement in 5.3.2 shall have achieved a response rate of at least 50% of respondents approached

5.4.5 All targets included in the WTP for the first five year period shall have been achieved and evidence to support this shall be made available on request.

5.4.6 The organisation shall be able to demonstrate that good practice in WTP has been promoted, as opportunity arose.

NOTE *This could be achieved through conference presentations, articles in trade press, support of area-wide travel plans.*



6 Claims of conformity

6.1 General

Claims of conformance with this PAS shall be made in the principal documentation provided for the travel plan for which the claim is being made, in accordance with BS EN ISO/IEC 17050 [12] and in the form relevant to that particular claim as provided for in 6.3. This statement shall include unambiguous identification of the organisation claiming conformance.

6.2 Scope of claim

In making a claim of conformance with this PAS, the organisation shall address all of the provisions of the PAS.

6.3 Basis of claim

6.3.1 General

The claim shall identify the type of conformity assessment undertaken as one of:

1. self-declaration in accordance with 6.3.2;
2. other party validation in accordance with 6.3.3.

NOTE Attention is drawn to the fact that claims of conformity made in accordance with 6.3.3, are most likely to gain confidence.

6.3.2 Self-declaration

In undertaking self-declaration, organisations shall be able to demonstrate how they meet the requirements of this PAS using supporting documentation. The appropriate method for self-validation and for presentation of the results shall be through the application of BS EN ISO/IEC 17050 [12].

NOTE Organisations, for whom other party validation is not a realistic option, may rely on self-validation, but in so doing they should be aware that external validation could be required in the event of challenge and that potential customers could have less confidence in this option. Customers may well have strong preference for demonstration of independent other party validation.

All claims of conformity based on self-declaration shall include identification of the basis of the claim, using the appropriate form of disclosure, as follows:

“Workplace travel plan provided by [insert unambiguous identification of the claimant] in accordance with PAS 500, self-declared.”

6.3.3 Other party validation

An organisation seeking to demonstrate that their WTP has been independently validated as being in accordance with this PAS, shall undergo assessment by an independent other party validation body that is able to demonstrate its compliance with recognized standards setting out requirements for such bodies.

NOTE An example of such a recognized standard is BS EN 45011 [13].

All claims of conformity based on other party validation shall include identification of the basis of the claim, using the appropriate form of disclosure, as follows:

“Workplace travel plan provided by [include unambiguous identification of the entity acting as the provider] to PAS 500, National Specification for Workplace Travel Plans. [identification of verifying body].”



Annex A (informative)

Glossary

A.1 Active travel

Active travel is used to describe interventions that are designed to produce greater levels of physical activity especially walking and cycling and is used to link transport and health policy objectives. There is an assumption that “active travel” will make a contribution to reduced levels of obesity. More information can be found at www.sustrans.org.uk/default.asp?slD=1089735305687

A.2 Alternatives

The term “alternatives” is used to indicate alternatives to the single occupancy vehicle or SOV (see A.4).

Alternatives include a variety of possibilities that go wider than traditional modal choices. In this PAS the term is used to include:

- All modal choices including bus, minibus, train, bike, walk, underground, tram, urban rail systems of any kind whether overground, underground or elevated and powered two wheeler;
- All alternatives to SOV that are car based including car share schemes, car clubs, taxis and guaranteed ride home schemes;
- All forms of electronic substitution that can be deployed to reduce the physical need to travel (videoconferencing, teleworking etc);
- All organisational changes that can be used to reduce the number of trips and or the distances travelled e.g. compressed working, the nine day fortnight, hot-desking, shared offices near to where people live.

A.3 Multi-modal count

Multi-modal counts are counts and/or surveys that set out to collect data on all possible modes of transport to a particular destination including walking, cycling and public transport.

A.4 Single occupancy vehicle (often referred to as SOV)

This is a vehicle where the only occupant is the driver

A.5 Transport Demand Management (often referred to as TDM)

The now generally accepted view of TDM is: “*designed to better balance people's needs to travel with the capacity of available facilities to efficiently handle this demand*”.

If ‘predict and provide’ was the old approach to transport planning then TDM is the new approach – a new paradigm in transport planning. However TDM means more than just ‘managing’ – implicit in the use of the term is the assumption that it is accompanied by the implementation of sustainable mobility, introduction of full cost pricing and organisational/ structural measures to ensure a broad range of complementary interventions work effectively together to realise the benefits of integration. It is the *unifying philosophy* of TDM that underpins the policy objective of a more sustainable system of transport. Put another way, TDM is the approach by which we deliver a more sustainable system of transport and is not just a stack of measures and initiatives called TDM.

TDM is based on three inter-linked assumptions:

- Meeting year on year increases in the demand for mobility into an indefinite future is not feasible or desirable and does not represent value for money;
- It will continue to be necessary to satisfy the need for access to services and facilities and this can be achieved through a variety of mechanisms including greater attention to locational decisions, better quality alternatives, the substitution of electronic communication for physical travel where appropriate and greater levels of mixing of modal choices and organisational changes to reduce the need to travel;
- Pricing and charging are important so that transport choices and decisions can be based on accurate costings and prices. An example of this is parking. The provision of parking spaces is costly and it is fair to build those costs into a pricing regime.

NOTE 1 *Parking and its management is a crucially important issue in designing and implementing travel plans. Those preparing travel plans should take a view in consultation with the local planning authority on what is an appropriate number of parking spaces for that site and what is an appropriate charging regime for those spaces. Chapter 11 of the DfT publication “The essential guide to travel planning” referred to in Annex B contains guidance on parking and parking management in travel plans.*

NOTE 2 *Further guidance can be found in How to create a travel plan – Managing car parking [14].*

Travel planning is an important part of an effective TDM, usually referred to as an ‘organisational’ component of TDM as shown in Table A.1.

Table A.1 Summary of the components of an effective TDM strategy

Component		Focus
A	Physical	infrastructure to make TDM happen
B	Operational	technology to manage demand and maximize operational effectiveness
C	Financial	using economics to affect trip choice
D	Organisational	integration with other activities
E	Research	analysis to evaluate performance
F	Political	commitment to address obstacles and provide appropriate funding
G	Integration	effective inter-disciplinary communication and work practices



Annex B (informative)

Publications, government guidance and best practice on workplace travel plans

B.1 General

The Department for Transport has produced general guidance on travel plans in its publication "The essential guide to travel planning", March 2008.

www.dft.gov.uk/pgr/sustainable/travelplans/work/essentialguide.pdf

The same DfT publication identifies the main sources of guidance and support for WTPs.

NBTN has prepared a useful guide to the taxation implications of travel plans and all those involved with travel plans should consult this guidance. It can be found on: www.nbtn.org.uk/NBTN_ADVISORY_NOTE_1.pdf

In addition to this guidance, the NBTN has published an advisory note on the inclusion of powered two wheelers in travel plans. The note can be found on the NBTN website at www.nbtn.org.uk

Guidance on travel plans can be found in documents from the Welsh Assembly Government, the Scottish Government and the Northern Ireland Executive.

Welsh Assembly Government
Planning Policy Wales. Technical Note 18, Transport
http://new.wales.gov.uk/docrepos/40382/epc/planning/403821/40382/1333429/TAN_18_Final_April_2007.pdf?lang=en

Scottish Government
Travel Plans: an overview
www.scotland.gov.uk/Publications/2002/10/15454/11007

Northern Ireland Executive
Workplace Travel Plans
www.travelwiseni.co.uk/index/employers/workplacetravelplans.htm

WTP guidance relating to travel plans in London can be found at www.newwaytowork.org

B.2 National Business Travel Network

National Business Travel Network (NBTN) is a business network which enables organisations to share best practice and promote the business case for travel plans and Smarter Choices. Through regular meetings and a

range of resources, NBTN members can engage with other businesses, develop partnerships, access free information and tools and provide advice and feedback to Government on related policy issues. A Department for Transport initiative, NBTN promotes and demonstrates the benefits to business of sustainable travel measures, working in partnership with and supporting existing organisations and networks.

For further information, contact info@nbtn.org.uk

B.3 Department for Transport

Information and resources on travel planning can be found on the 'Sustainable travel' section of the Department for Transport website www.dft.gov.uk/pgr/sustainable/

The DfT THINK campaign has a number of resources available on its website. www.thinkroadsafety.gov.uk/campaigns/drivingforwork/employers.htm

B.4 ACT TravelWise

ACT TravelWise is the leading network for travel planning expertise in the UK. A membership association of large public and private sector employers, it provides support and information to organisations on implementing effective travel plans, as well as news, contacts and services.

For more information, contact ACT TravelWise on 020 7348 1970 or see www.acttravelwise.org

B.5 Transport Direct

www.transportdirect.info is a free website that provides travel information and enables journey planning by car and public transport to any destination in Great Britain.

B.6 RoadSafe

RoadSafe is acknowledged as a leading forum for promoting and devising solutions to road safety problems. www.roadsafe.com

B.7 Bike for All

www.bikeforall.net is a gateway to find cycling promotion, contacts and sources of information.

B.8 Carplus

Carplus offers information, advice and support to communities, local authorities and partner associations developing car share hubs across the UK.
www.carplus.org.uk

B.9 Telework Association

The Telework Association provides information, advice and support to enable individuals and managers to make a success of mobile, home-based and flexible ways of working.

For more information contact enquiries@telework.org.uk or 0800 616008 or see www.tca.org.uk

B.10 Other sources of information

The Department for Transport has published several reports on the definition of a travel plan, best practice and case studies and these are summarized and referenced on the DfT web site: www.dft.gov.uk/pgr/sustainable/travelplans/work/publications/travelplans?page=1#a1003

A full travel plan resource pack setting out clear guidance and information on every stage of the travel plan process with case studies is available on www.travelplans.org.uk/index2.html

In 2004 DfT published its "Smarter Choices" report which contains a full review of the performance of WTPs and how they can contribute to achieving transport policy objectives. The report can be downloaded from www.dft.gov.uk/pgr/sustainable/smarterchoices/ctwwt/chapter3workplacetravelplans

The "Smarter Choices" report reviews case studies of travel plans in seven locations in England and discusses the costs of travel plans, their effectiveness and take-up by public and private sectors.

MerseyTravel has produced clear guidance on travel plans and the content is of general relevance and not limited to Liverpool and the surrounding local authorities www.letstravelwise.org/travelwise/travel-plans.html and www.letstravelwise.org/116/

London guidance on WTPs is also of general relevance to the content and quality control of WTPs wherever the organisation is based. The main document "*Guidance for workplace travel planning for development*" has been produced by Transport for London (March 2008) and is available on www.tfl.gov.uk/assets/downloads/corporate/Guidance-workplace-travel-planning-2008.pdf

TfL also has a suite of publications on other aspects of travel plans including cycling, smarter working and car sharing and they can be downloaded from www.tfl.gov.uk/corporate/projectsandschemes/workplacetravelplanning/7680.aspx

The same source of downloads has a selection of documents aimed specifically at travel plans for NHS sites (including hospitals).

Most local authorities have specialized travel plan officers who are able to assist and advise on WTPs and they should be contacted in the early stages of travel plan formulation.



Annex C (normative)

Survey checklist

C.1 Information for all sites

The surveys and information gathering exercises carried out at new and/or existing sites shall include the following information:

For both new and existing sites:

- Date of compilation of this checklist;
- Organisation name;
- Organisation address (including post code);
- Name of local authority area in which site is located;
- The details of any planning applications or consents related to this site (including application number);
- The name and full postal address of the business park or industrial estate where the site is located if it is located in one of these categories;
- Name and job title of person responsible for the travel plan;
- Contact details (e.g. e-mail, telephone number, fax number);
- Land use category (please tick which category your organisation falls under).

C.2 Land use categories

The land use categories selected shall follow the definitions and use classes in the following documents. In all cases those using these official classifications of land use should check for subsequent amendments.

England

www.planningportal.gov.uk/england/genpub/en/1011888237913.html. The latest amendment to this document was issued in 2006 and can be found on: www.opsi.gov.uk/si/si2006/20060220.htm

Wales

www.opsi.gov.uk/legislation/wales/wsi2002/20021875e.htm

Scotland

www.opsi.gov.uk/si/si1997/19973061.htm

Northern Ireland

www.opsi.gov.uk/sr/sr2004/20040458.htm



C.3 Existing sites

For existing sites the following information shall be reported in the WTP:

General

- Total number of employees identifying those in full time, part time and those involved in shift work
- Details of the travel plan budget in each of the first 3 years of the currency of the plan

Car parking

- Number of car parking spaces by category:
 - Employees (total)
 - Senior Staff
 - Disabled
 - A drop off point
 - Patients
 - Visitors
 - Essential car users
 - Car sharers
 - Pool cars
 - Fleet vehicles (excluding HGVs)
 - HGVs
 - Other (*please describe*)
- How are the spaces managed:
 - Free for all
 - Needs based
 - According to grade
 - Allocated spaces
- The charge per space per day or per other period (It should be stated if no charge is made)
- Details of car share programme or car club availability
- Details of guaranteed ride home scheme (if present)
- Bicycles:
 - Number of bicycle spaces
 - Are there cycle racks? (Please specify number by category)
 - Covered
 - Secure
 - Lit
 - Overlooked by CCTV
 - Near building entrance(s)
- Details of the incentives to cycle which are in place focusing specifically on assisted bike purchase, tax-free bike purchase, bike maintenance, discounted purchase of bike clothing and accessories, shower facilities and lockers

- Details of bike mileage allowance for use of bike on work purposes

Pedestrians

- Details of pedestrian access to the site and condition of footpaths including lighting and CCTV (both public paths and on site)

Motorcycling

- How many motorcycle parking spaces exist and how many are:
 - Conveniently near the entrances(s) to the building(s)?
 - Secure?
 - Covered?
 - Lit?
 - Overlooked by CCTV?
- The business mileage rate for motorcyclists

Public transport

- Details of public transport facilities in close proximity to the site including how many bus stops are within 400m of the site
- What is available at each bus stop:
 - Are there any shelters?
 - Are they clean?
 - Are they well lit?
 - Is there timetable/live travel information?
 - Are there seats?
- Which services currently use these bus stops?
- Is there a railway station near the site? Give the name or names of any stations within 800m of the site.
- Is there a tram stop near the site? Give details of the name of the stop and its location.
- Are there private buses/minibuses run for staff and/or visitors to the site?
- Are any of the following available:
 - Free rail/bus season tickets
 - Subsidised rail/bus season tickets
 - Rail/bus season ticket loans
 - Clothing allowance (walkers, cyclists, motorcyclists)
 - Equipment allowance (walkers, cyclists, motorcyclists)
- Smart working practices adopted by the organisation including details of the following:
 - Flexi-time

- Teleworking
- Teleconferencing
- Audioconferencing
- Compressed working week
- Home working
- Hot-desking

C.4 Scope of the baseline survey

The baseline survey shall produce actual numbers of staff travelling to work by all the modes listed in Table C.1.

This table shall report actual numbers and not percentages and shall be based on an actual survey.

It shall include the date of survey on which this table is based.

Table C.1 Summary of baseline data and requirements by mode

Mode	Actual number
Car driver alone (SOV) (see A.4)	
Car as passenger	
Motorbike	
Bus	
Tram	
London underground	
Rail (suburban rail and main line rail)	
Metro (e.g. Merseyrail, Tyne and wear Metro)	
Bike	
Bike and train (combined)	
Foot	
Other	

C.5 Targets

C.5.1 New sites

Surveys for new sites shall identify a target based on the percentage of all staff that will travel to the new site by car alone (SOV or single occupancy vehicle).

C.5.2 Existing sites

Any targets based on modal shift shall be provided as “percentage point change” targets e.g. an increase in

the current level of cycling by 5% (percentage points) means that a baseline share of 10% would now be 15%. Actual figures shall also be shown so that if 100 people were cycling in the baseline data a 5% increase would mean that 105 people are now cycling.

All targets shall be listed as detailed in Table C.2 (the first line is an example for illustrative purposes only):

Table C.2 Summary of targets

	Details of target	% change required	Baseline number and date	Target number and date
Target 1	Increase cycling levels	+5%	100 cyclists at 30 May 2008	105 cyclists at 30 May 2009
Target 2				
Target 3				
Target 4				



Where modal shift targets cannot be specified (e.g. in the case of a completely new development where there is no baseline data) there shall be a target based on the percentage of staff who will travel to the specified site by SOV (single occupancy vehicle) (see A.4) e.g. “No more than 40% of all staff will travel to work by car as driver (SOV) by [insert month and year]”

The organisation shall determine the actual percentage.

Annex D (normative)

Survey methodology including trip generation databases

D.1 Evidence base

The WTP shall be based on an evidence base resulting from at least the following:

- The results from an employee survey;
- The results from a visitor survey;
- Multi-modal count (direct observation at all site entry and exit points);
- Vehicle parking counts by type of vehicle and throughout the day and including any off-site parking where this has been provided as part of the parking option for staff and visitors;
- Deliveries (number of vehicles, types of vehicles).

D.2 Employee survey and travel diary

NOTE 1 For most organisations seeking to develop a travel plan this will mean a survey of existing staff to establish the baseline travel data and modal choices.

NOTE 2 PAS 500 does not provide a “ready made” survey. Many of the sources of information in Annex B provide examples of surveys and survey design suggestions and the Transport for London publication “Guidance for workplace travel planning for development” (March, 2008) covers survey methodology and trip generation databases in Appendix 11.

A survey of the travel behaviour of existing staff at a workplace shall include questions that will provide accurate and reliable information on the following:

- Home origin of trips defined by home postcode;
- Destination identified by postcode;
- Distance from home to work;
- Choice of mode for the journey to work in sufficient detail to identify multi-modal trips (e.g. a walk to a bus stop or cycle to a railway station);

This information shall be collected for both the journey to work and the return journey.

Modes shall include walk, cycle, car with driver alone (generally referred to as Single Occupancy Vehicle Use or SOV) (see A.4), car as passenger, train, tram, other. Attitudinal questions about propensity to change shall also be included.

NOTE 3 Attitudinal questions are useful as part of the process of discussing options and interventions with staff and other interested parties. A question of the kind “Would you be more likely to cycle to work at least two days a week if there were a segregated cycle path along the main road

to this site?” is very useful for stimulating discussion and supporting the psychological processes underpinning behavioural change. These questions should be relatively few in number and should be linked to questions about the degree of support for particular interventions and packages of measures e.g. “Would you support the introduction of a parking charge of £5 per day where the income from this charge was used to fund a 30% discount on buses in this area?”

Personal data on age/job grade/job location/gender/disability/ethnicity/full time or part time shall be gathered.

Those completing the survey shall be encouraged to make their own comments about travel issues relevant to their site.

The survey shall be structured to enable trip variability to be captured (e.g. I work from home on a Friday, cycle on a Monday but drive on the other days).

NOTE 4 Where possible, staff travel surveys should be carried out online. This saves paper, time and money and the answers can be directly entered into standard software for statistical analysis (e.g. SPSS) to produce descriptive statistics, tables, diagrams and histograms.

Where appropriate, the survey results shall be presented in visual form in order that the significance of the survey results is understood by all those responsible for making decisions about the travel plan. This shall include a “dot-map” showing the home locations of staff.

The dot-map shall be marked so that it shows concentric circles around the site at a radius of 1-5 km, 6-10 km, 10-20 km or any other radii that local conditions would indicate are useful. The detail on the map in terms of individual streets and house numbers shall not be such as to identify individual addresses and the map need not be published.

NOTE 5 The dot-map is intended to stimulate and inform the internal discussion about the role of walking, cycling, bus routes and other transport choices that are specifically relevant to the site in question. For publication purposes it is recommended that a table be drawn up showing how many staff live within specific distance bands of the site in question.

The results of the staff travel survey shall be benchmarked against information contained in

standard trip generation databases.

NOTE 6 Examples of such databases are TRAVL which is largely London based and TRICS which is national with some sites in London.

NOTE 7 The purpose of benchmarking is to show how the baseline and subsequent travel survey updates perform against what is recorded at comparable sites in trip generation databases.

NOTE 8 Where TRICS and TRAVL are used these should be modified so that:

- they adopt the same definitions of trips and measure multi-modal trips in the same way;
- incorporate spatial information (postcodes) into their databases;

- adopt the same system of land use classification;
- adopt the same definitions of trips rates so that results across TRICS and TRAVL and at WTP sites can be compared;
- agree a protocol on the ways that survey days are defined (it is not helpful if data collected on different days are compared one with another across two databases).

NOTE 9 Information is not currently collected by both organisations in a directly comparable way and the increase in travel plan numbers in London and nationally and the importance of quality control and the widespread adoption of PAS 500 would suggest that there are considerable advantages to be gained from harmonization between the databases and the survey methodology in PAS 500.



Annex E (informative)

Sources of information and examples of target setting

The DfT publication, "*The essential guide to travel planning*", presents information on the performance of travel plans which is a key source of guidance on targets:

Whether your targets are entirely internal or required as part of a planning agreement, they should be both achievable and stretching. The information that you have collected through surveys and other means will enable you to make a judgement about the opportunities for change. To arrive at targets, you need to access these opportunities against the effort and money that your organisation can commit to them.

The overall target should be expressed in terms of reducing driver trips to site, which can usefully be expressed as the number of commuter cars arriving per 100 employees. This measurement allows you to judge your progress over time, even if staff numbers on site go up or down, and enables direct comparison with the performance of other organisations, whatever their size. You may also find it helpful to set sub-targets to show the increases you aim to achieve in other ways of travelling to your site, such as walking or public transport, and a target for reducing the proportion of business travel made by car.

The DfT report recommends looking at the performance of other travel plans and using this information as a guide to what can be achieved at the site under discussion. Targets should be "achievable and stretching" but there should also be recognition of the link between targets and the potency of interventions. Poor quality interventions within a generally aspirational context will produce very little modal shift whereas large scale intervention with incentives and disincentives and dramatic improvements in bus quality will produce significant shifts in travel behaviour. The example of Pfizer at its Sandwich (Kent) manufacturing plant is often quoted as a significant intervention producing a good result:

www.kent.gov.uk/transport-and-streets/sustainable-transport/travel-plans/pfizer-travel-plan.htm

The reports from DfT, "*Making travel plans work*", provide case studies and guidance on setting targets and they should be a starting point for any target setting exercise:

www.dft.gov.uk/pgr/sustainable/travelplans/work/publications/makingtravelplansworklessons5783

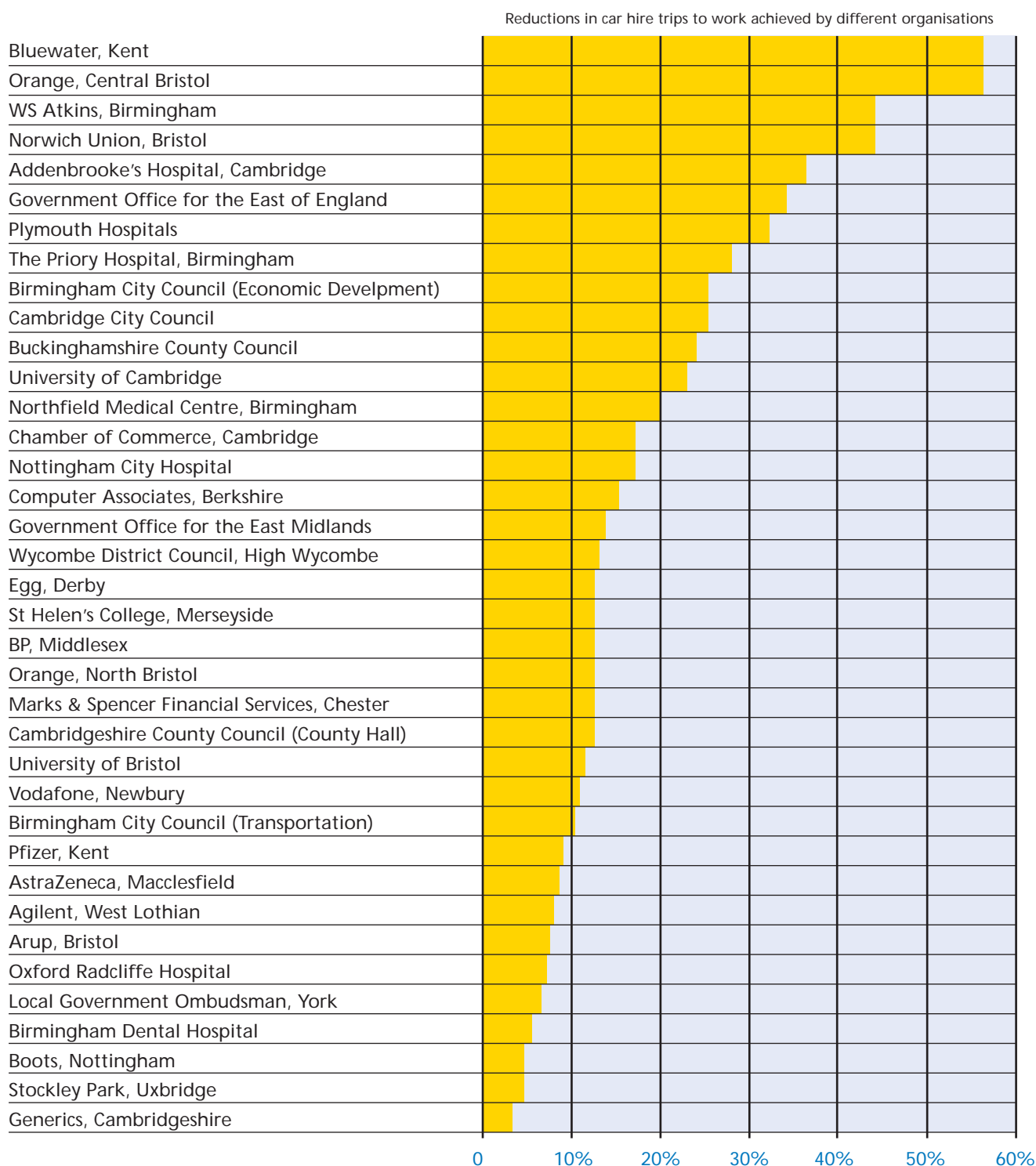
www.dft.gov.uk/pgr/sustainable/travelplans/work/publications/makingtravelplansworkresearch5784

Figure E.1, taken from "*The essential guide to travel planning*", summarises the results of some of the travel plans most frequently quoted in the UK.

DfT "*The essential guide to travel planning*", March 2008

www.dft.gov.uk/pgr/sustainable/travelplans/work/essentialguide.pdf

Figure E.1 Results of some of the travel plans most frequently quoted in the UK



Source: DfT "The essential guide to travel planning", March 2008, page 20

www.dft.gov.uk/pgr/sustainable/travelplans/work/essentialguide.pdf

An example of target setting practice in the NHS has been published by TfL:

Croydon Primary Care Trust set the following targets (Table E.1) and, in their executive summary to the Board for approval of the travel plan, included a justification as to how and why the targets had been set:

Table E.1 Sample targets

Target	Comment
To increase the proportion of staff cycling/walking for to/from work from 1% to 7% by December 2006.	The staff travel survey showed that 56% of respondents live within five miles of their place of work, suggesting that there is much scope for increasing walking/cycling for the journey to/from work. In addition, 29 of the 42 respondents who live less than 2 miles from their place of work usually travel to work by car, suggesting that there is scope for a shift from car use to walking amongst these staff.
To increase the proportion of staff travelling by public transport to/from work from 22% to 25% by December 2006.	The travel survey showed that there was scope for increasing use of the bus, train and Tramlink, with 8%, 12% and 2% currently travelling by these modes respectively.
To reduce the proportion of staff driving to work from 73% to 63% by December 2006.	The reduction in car use will be achieved through increases in walking, cycling and public transport use, and will be supported by encouraging car sharing.
To increase bus use for travel on Trust business from 15% to 20% by December 2006.	76% of staff currently use their own car as the main mode of transport when travelling on Trust business. However, there was a feeling that alternatives to the car could often be used for Trust business. In particular, it was felt that taxis were often used when bus would provide a better and cheaper alternative.

Great Ormond Street Hospital NHS Trust set the following targets in October 2003:

- To increase the proportion of cyclists regularly cycling all, or some of the way to work, from 7% to 9% by January 2006.
- To increase the proportion of cyclists occasionally cycling all, or some of the way to work, from 2% to 4% by January 2006.
- To increase the proportion of staff regularly walking to work as their main mode from 9% to 11% by January 2006.
- To reduce the proportion of staff driving alone to the site from 5% to 4% by January 2006.
- To ensure that any reduction in public transport

mode split from 79% is due to a transfer to walk/cycling and not a transfer to car use.

Source: www.tfl.gov.uk/assets/downloads/corporate/06-objectives-targets-and-monitoring.pdf

Target setting is essentially a matter for local determination but there should be a presumption that all sites can perform as least as well as case study sites showing similar characteristics and an assumption that the travel plan is serious and willing to apply best practice and deploy a raft of measures that are known to work with as many measures as possible working synergistically to achieve the targets set.



Annex F (normative)

Classification grades matrix

Figure F.1 provides a matrix of the classification grade requirements defined in Clauses 5.2, 5.3 and 5.4.

Table F.1 Classification grade matrix

	Bronze	Silver	Gold
Requirements of clauses 3 and 4 met	✓	✓	✓
Budgetary requirements met	✓	✓	✓
Survey carried out and analysed (existing sites)	✓	✓	✓
Secondary sources on travel behaviour evaluated for new sites	✓	✓	✓
A named director or senior manager has overall responsibility	✓	✓	✓
A named individual is responsible for implementation	✓	✓	✓
Implementation strategy with targets and milestones for five years	✓	✓	✓
A marketing and communication strategy shall be in place for a five year period	✓	✓	✓
Travel survey questions and results shall be published and survey must have a 30% response rate		✓	✓
First year targets achieved		✓	✓
There shall be an increase in the use of alternative modes and a reduction in SOV trips		✓	✓
Full list of measures shall be communicated to all staff and made available on request to others		✓	✓
The member of staff responsible for implementation shall have completed training		✓	✓
The travel plan shall have been in place for five years			✓
A full survey shall be carried out at the end of year five and the results published			✓
The response rate for this survey shall be at least 50%			✓

	Bronze	Silver	Gold
There shall be evidences that all the targets in the travel plan up to and including year five have been achieved			✓
Good practice in travel planning shall be promoted to a wider audience			✓



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www.businesslink.gov.uk/bdotg/action/layer?r.l1=1079068363&r.l3=1079934951&topicId=1079934951&r.t=RESOURCES&r.i=1079941517&r.l2=1079363670&r.s=m



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