Transport for New Developments:

Transport Assessments and Travel Plans

March 2014

OXFORDSHIRE
COUNTY COUNCIL

TRANSPORT FOR NEW DEVELOPMENTS –
TRANSPORT ASSESSMENTS AND TRAVEL PLANS

This document sets out the format and requirements of Transport Assessments and Travel Plans associated with new developments throughout Oxfordshire. It sits under the overarching polices set out in the Council's Local Transport Plan.

It is part of a suite of documents for use by people involved in planning for new developments and is aimed at developers, promoters, consultants, architects, highway engineers, planning officers, the public and any other interested parties.

Throughout the document some illustrations are used to help explain some of the important design principles but should not be interpreted literally.

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1   Introduction

Policy Context and General Methodology

1.1   The requirement for Transport Assessments and Travel Plans is set out in the National Planning Policy Framework (NPPF) (Department of Communities and Local Government, March 2012). Paragraph 32 states that: 'All developments that generate significant amounts of movement should be supported by a Transport Statement or Transport Assessment'. Paragraph 36 states that 'All developments which generate significant amounts of movement should be required to provide a Travel Plan'.

1.2   Transport Assessments and Travel Plans are important tools in the Council's strategy to achieve the goals and objectives set out in its third Local Transport Plan, LTP3 (2011-2010). They are a means of delivering LTP3 Policy SD1, which sets out how we will seek to influence development to meet our transport objectives:

Policy SD1   Oxfordshire County Council will seek to ensure that:
- the location and layout of new developments minimise the need for travel and can be served by high quality public transport, cycling and walking facilities;
- developers promote sustainable travel for all journeys associated with new development, especially those to work and education, and;
- the traffic from new development can be accommodated safely and efficiently on the transport network.

For further policy references see Appendix 14.

1.3   This document sets out the format and requirements of Transport Assessments and Travel Plans associated with new developments throughout Oxfordshire. It is part of a suite of documents for use by people involved in planning for new developments and is aimed at developers, promoters, consultants, architects, highway engineers, planning officers, the public and any other interested parties.

1.4   The general methodology adopted by the Council is contained in:
- Transport assessments: Department for Transport publication *Guidance on Transport Assessment* (March, 2007)

- Travel Plans: Department for Transport and Department for Communities and Local Government publication *Delivering Travel Plans Through the Planning Process* (April, 2009)
- Residential Travel Plans: Department for Transport publication *Making residential travel plans work: guidelines for new development* (September, 2005)
- Workplace Travel Plans: Department for Transport publication *The essential guide to travel planning* (October, 2007)
- Personal Travel Plans: Department for Transport publication *Making personal travel plans work: Practitioners' guide* (November, 2008)

1.5　The assessment of all of the modes of transport and travel patterns of any development may range from a simple and straight forward process to one that is complex and 'non standard'; since it must address the transport impacts of alternative modes of transport for a variety of differing types and sizes of development in different locations.　No two transport assessments or Travel Plans are likely to be the same, what is appropriate for one development is unlikely to be the same for another.

1.6　It is however necessary to fully understand the transport requirements for development proposals regardless of size. There are a variety of different ways in which developers can assess the transport impacts of their development. The methods used will depend upon the type and scale of the proposal and whether it is located in an area that is considered to have transport problems. Early scoping discussions with Oxfordshire County Council will steer the type of assessment required.

1.7　Broadly; the impact of the majority of proposed development needs to be assessed. The very smallest of developments will not require an assessment. For the greater number of planning applications, a Transport Statement and accompanying Travel Plan Statement are required. These are in a simple form which must be fully completed and submitted with the planning application. For larger developments a Transport Assessment and Travel Plan are required. Transport Assessments are generally bespoke assessments which at first will require a scoping study to establish the level of detail and geographic area of the study. A series of thresholds are applied to determine what is required according to the size and impact of the development proposal (please refer to appendix 1 for more details).

1.8　The Transport Assessment may form part of an Environmental Assessment if the latter is required by the Planning Authority.

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Process

1.9   When it is known by a potential applicant or developer that a planning application is going to be made then the first step is to ascertain what kind of Travel Plan and Transport Assessment will be required. The table for Thresholds for Travel Plans and Transport Assessments must be referred to (appendix 1). On determining what kind of assessments and submissions are needed then the appropriate scoping must be undertaken. In the case of needing to submit a Travel Plan Statement and Transport Statement the appropriate forms must be used.

1.10   The information contained within appendix 1 is for guidance only and a Travel Plan may be appropriate for a development smaller than suggested by the thresholds. Factors other than size of development may be taken into account when determining the need for a Transport Assessment or Travel Plan. For this reason early pre-application discussions with Oxfordshire County Council are strongly recommended.

1.11   If an applicant or developer is unsure about interpreting the thresholds, it is advisable to contact the Travel Plans Team within the Transport Development Control Group at Oxfordshire County Council for clarification. Please refer to appendix 15 for contact details.

1.12   Where a planning application involves an extension to an existing site that is either at or above the relevant threshold, or if the development will cause the combined existing and proposed land uses to go above the threshold, a Travel Plan Statement or Travel Plan is required according to the extended size. In these cases the whole site should be covered.

     The aim of the Council in producing this document is to provide easily accessible standard advice, thereby improving the efficiency of the planning application process. However, we recognise that some developers may require additional support or practical help with drawing up travel plans or with their implementation. The Council may be able to provide tailored support for which it will charge a fee based on officer time plus any expenses, for example associated with site visits. Note that this would be in addition to monitoring fees which will be applied in all cases where a travel plan is required.

1.13   The submission of a Travel Plan is not a guarantee that a proposed development will not be objected to on highways grounds if other supporting documentation, such as a Transport Assessment, does not demonstrate acceptability in highways terms.

2 Transit Statement

Principle

2.1   The Transport Statement sets out the transport issues relating to a proposed development site; existing conditions and the impact of the development proposals in a simple form. It is completed by the developer and supplied with a planning application. Note that for larger developments a Transport Assessment is required. For guidance on whether a Transport Statement or a Transport Assessment is required, see appendix 1.

Content

2.2   The Transport Statement is filled in from the blank form which can be found in appendix 2.

3 Transport Assessment

Principle

3.1 It is advisable to establish as early as possible when a Transport Assessment is required by referring to the thresholds found in appendix 1.

3.2 When it has been established that a Transport Assessment is required then the scope and content of the study needs to be ascertained.

3.3 The Scoping Report should be completed and forwarded to the Highway Authority at the outset and will form the basis of discussions before the Transport Assessment is commenced.

3.4 The Scoping Report for Transport Assessments Form is filled in from the blank form which can be found in appendix 3.

3.5 If a Transport Assessment is required, we will expect it to be submitted with and accompany the planning application.

Content

3.6 Whilst it is accepted that much of a Transport Assessment will be written in technical language with diagrams and data being generated by the use of specialist software packages, it is important that the Conclusions, Recommendations and Non-technical Summary are written in clear, concise language, and fully describe the way the development will affect existing highway and transport facilities including public rights of way.

3.7 Where relevant, details of the following must also be provided:-

- the extent and feasibility of the development access proposals, including plans showing any necessary highway improvements and the impact these and any additional traffic will have on the existing local environment;
- how the development can be accessed by walking, cycling, motor cycling, public transport, cars, service and delivery vehicles, and emergency services;
- how encouragement will be given to travel by walking and cycling within the development;

- proposals for new public transport provisions and details of any facilities related to these;
- how future travel patterns will be monitored and reviewed, and
- parking provisions to be made for cars, cycles and motorcycles.

3.8   Plans must be included of all relevant transport routes leading to, and adjacent to the development site including public rights of way.

3.9   For commercial and distribution developments, details must be provided for delivery arrangements. Developers should refer to the Oxfordshire Lorry Routes maps, which are available to download from the county council's website: http://www.oxfordshire.gov.uk/cms/content/lorry-routes

4   Travel Plan Statements

Principle

4.1   The Travel Plan Statement is a simple form that sets out the existing conditions within and near to the development and contains a commitment to the promotion of sustainable travel. It also sets out objectives and measures to encourage travel by sustainable modes. It is completed by the developer and supplied with a planning application. Note that for larger developments a Travel Plan is required. For guidance on whether a Travel Plan Statement or a Travel Plan is required, see appendix 1.

4.1   A Travel Plan Statement:
- must be completed when the application is for a small-to-medium sized development where a Full Travel Plan is not justified
- must set out commitment to the promotion of sustainable travel
- contains less detail than a Full Travel Plan to reflect the fact that it is designed for smaller developments.

Content

4.2   Please see appendix 4 for a copy of Oxfordshire County Council's Travel Plan Statement form. This must be completed, submitted and approved prior to planning permission.

5   Travel Plans

Principle

5.1   The requirement to produce Travel Plans is set out in the National Planning Policy Framework (paragraph 36). This guidance supplements the Department for Transport's (DfT) and Department for Communities and Local Government's (CLG) document *Delivering Travel Plans through the Planning Process* (April, 2009). It has been developed to assist with the preparation of Travel Plans associated with the development control process in Oxfordshire. It also supports the achievement of objectives in Oxfordshire's third Local Transport Plan.

5.2   Traffic levels have grown significantly in the last 20 years. The National Travel Survey (DfT, 2009) found that in 2012 car travel accounted for 64 per cent of all trips made and 78 per cent of all distance travelled. The same survey found that 20 per cent of all trips were shorter than one mile in length.

5.3   Oxfordshire County Council is committed to ensuring that development in the county is carried out in sustainable locations and in a sustainable way. Travel Plans can help with this aim by identifying ways in which developments can reduce car travel through reducing the need to travel, more efficient journey planning and planning for journeys to be made on foot, by bike, by public transport or by car sharing.

5.4   Opportunities for journeys to and from new developments to be made without using the car depend on good access to alternatives (such as walking, cycling and public transport) and for these modes of travel to be made more attractive.

5.5   An increase in the number of people travelling to and from an individual site may result when a new development is constructed, extended or when there is a change of use. To relieve increased pressure on Oxfordshire's road network, we may request that a Travel Plan is written, implemented and monitored.

5.6   A Travel Plan is a long-term management strategy that seeks to deliver sustainable transport objectives for an organisation or site. It is a living document that is implemented, regularly monitored and reviewed, and has an identified owner.

5.7   Travel Plans are developed by employers, schools, retailers, hospitals, residential developments and other sites / organisations to reduce the impact of travel by their employees, customers, visitors, clients and residents.

5.8   The objectives of a Travel Plan are:

- to ensure that locations are accessible by non-car travel modes
- to identify ways of reducing the need to travel to and from a development
- to minimise single occupancy car travel to and from a development, particularly through providing scope for journeys to be made by other modes
- to identify which measures are needed to maximise the use of non-car travel modes
- to lead to a change in the travel behaviour of individuals to a sustainable mode of travel and maintaining that change once it has occurred

5.9   The benefits of a Travel Plan can include:

- the provision of greater choice and opportunities for site access by non-car travel modes
- reduced social exclusion through improved access to employment and key services such as hospitals, education and shops
- reduced congestion on surrounding roads and access points and reduced demand for parking spaces
- local environmental improvements from reduced congestion, air pollution and noise
- reduced travel and transportation costs for organisations and individuals
- ensuring adequate provision for people without access to a car or with mobility impairment
- provision of opportunities for active, healthy travel
- achievement of environmental standards for businesses
- assistance with the recruitment of staff
- reduced car parking costs for businesses

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5.10   The purpose of the following information provides guidance to developers in producing high quality Travel Plans. By providing clarity and a standardised approach towards what is required in a Travel Plan, this will allow the quality of Travel Plans submitted in support of planning applications to be assessed in a fair and consistent way.

5.11   This document covers different types of Travel Plan that may be produced for new developments including: commercial; retail; residential; public sector; education; religious establishments; leisure facilities and so on.

5.12   In particular, the following information:

- identifies what type of Travel Plan is required
- explains the differences between different types of Travel Plan
- explains the Travel Plan process – from preparation of the plan to the implementation of measures to reduce car use
- explains how Travel Plans are assessed by Oxfordshire County Council
- outlines a monitoring methodology for Developer Travel Plans

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Types of Travel Plan
_____

5.13 Developers are encouraged to contact the Travel Plans Team within Oxfordshire County Council Transport Development Control Group at the earliest stage, i.e., prior to the submission of a planning application. This will allow officers to provide advice on what type of Travel Plan should be submitted.

5.14 The following types of Travel Plan will be required, depending on the characteristics of the development.

Full Travel Plan

5.15 A Full Travel Plan should be submitted in the majority of cases. It must be produced for all residential developments over 80 dwellings and in other cases when: • the proposed use and accessibility needs are known • the occupying organisation has been identified • the site is already occupied (e.g. if it is being extended), allowing the collection of baseline travel data and consultation with staff / visitors / residents.

5.16 **Full Travel Plans must be submitted and approved (as per Oxfordshire County Council requirements) at a point agreed by Oxfordshire County Council, usually prior to planning permission.**

Interim Travel Plan

5.17 An Interim Travel Plan may only be produced instead of a Full Travel Plan when • The development is non residential and the site occupiers/users are unknown • in circumstances where it is not possible to complete a Full Travel Plan • to accompany an outline planning application.

5.18 Interim Travel Plans must be submitted and approved prior to planning permission. **A Full Travel Plan must be developed and approved (as per Oxfordshire County Council requirements) prior to first occupation.**

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Framework Travel Plan

5.19   A Framework Travel Plan must:

- be produced for mixed-use developments with multiple occupiers and/or phases where any of the uses exceeds the travel plan threshold set out in Annex 1. Note that a Framework Travel Plan may also be required where individual uses do not exceed the threshold, depending on the combined impact of the development
- include joint overall outcomes, targets and indicators which are centrally administrated
- outline a commitment for individual sites (or uses/elements) within the overall development to prepare and implement their own Subsidiary Travel Plans.

5.20   Framework Travel Plans must be submitted and approved prior to planning permission. **Individual Subsidiary Travel Plans must be written and submitted to Oxfordshire for approval (as per Oxfordshire County Council requirements) within three months of occupation.**

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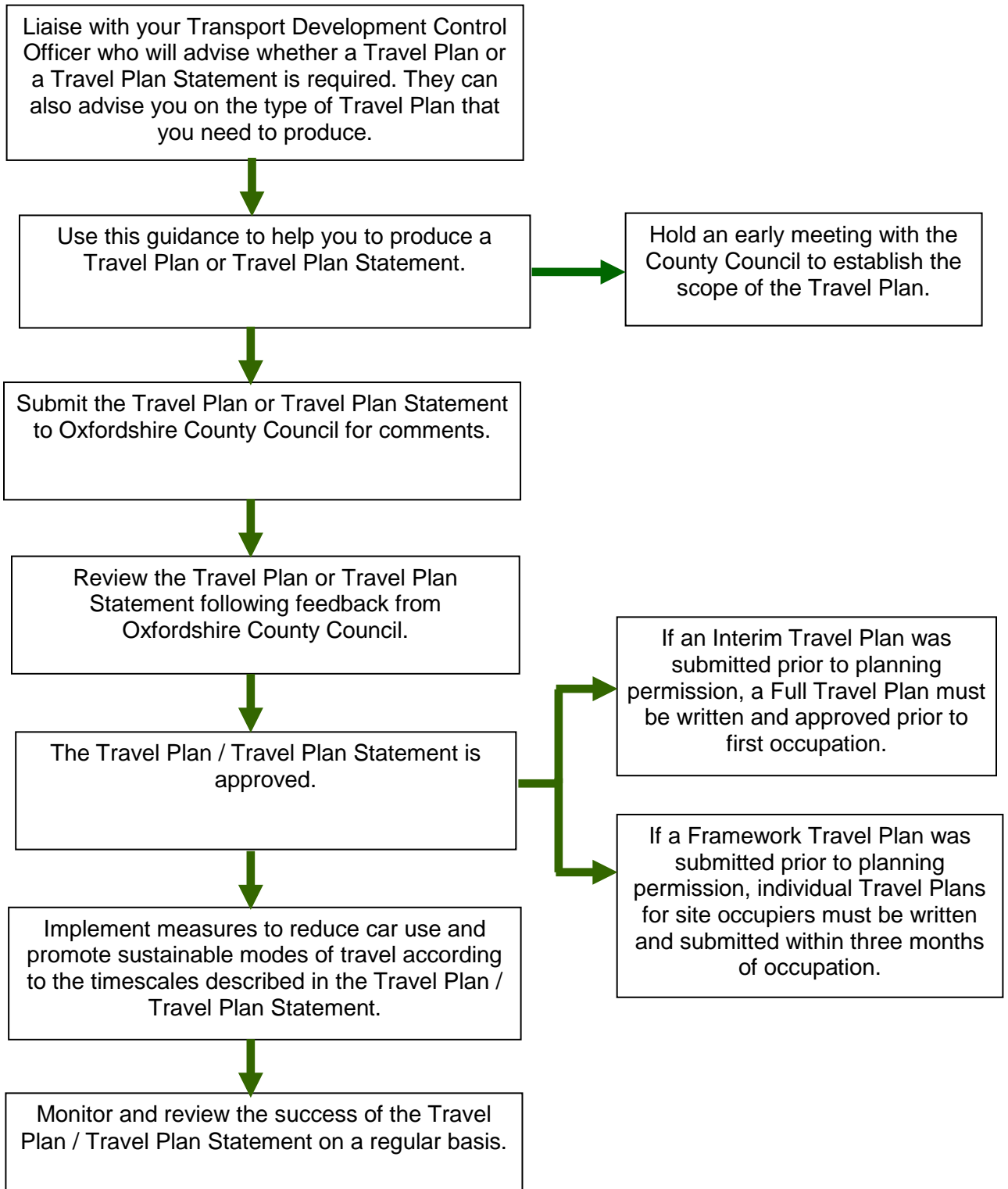TRANSPORT ASSESSMENTS AND TRAVEL PLANS

The Travel Plan process

Liaise with your Transport Development Control Officer who will advise whether a Travel Plan or a Travel Plan Statement is required. They can also advise you on the type of Travel Plan that you need to produce.

Use this guidance to help you to produce a Travel Plan or Travel Plan Statement.

Hold an early meeting with the County Council to establish the scope of the Travel Plan.

Submit the Travel Plan or Travel Plan Statement to Oxfordshire County Council for comments.

Review the Travel Plan or Travel Plan Statement following feedback from Oxfordshire County Council.

The Travel Plan / Travel Plan Statement is approved.

If an Interim Travel Plan was submitted prior to planning permission, a Full Travel Plan must be written and approved prior to first occupation.

If a Framework Travel Plan was submitted prior to planning permission, individual Travel Plans for site occupiers must be written and submitted within three months of occupation.

Implement measures to reduce car use and promote sustainable modes of travel according to the timescales described in the Travel Plan / Travel Plan Statement.

Monitor and review the success of the Travel Plan / Travel Plan Statement on a regular basis.

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Travel Plan Content

5.21 Oxfordshire County Council requires Travel Plans to contain the essential elements listed below. The order in which the elements are listed should be followed to ensure that there is a logical structure to the completed Travel Plan.

Travel Plans: Essential sections

- Cover page
- Introduction
- Background to the development
- Transport Data
- A commitment to conduct a baseline travel survey
- Objectives of the Travel Plan
- Targets - SMART
- Measures – to explain how the targets will be achieved
- Management of the Travel Plan
- Monitoring and Review

5.22 For detail on the information that must be included in each of these sections, please see Appendices 5, 6 and 7 for Full, Interim and Framework Travel Plans respectively.

5.23 Additional information may be requested for inclusion in the Travel Plan if thought to be relevant to the development or the surrounding area.

5.24 Residential Travel Plans must be treated quite differently to other types of Travel Plan to reflect the characteristics of the development and the wide range of journeys and destinations associated with residential areas. Therefore, there are specific measures which Oxfordshire County Council requires to be included in Residential Travel Plans. These include the provision of a Travel Information Pack for developments of over 10 dwellings, Personalised Travel Planning for developments of over 50 dwellings and taster tickets for public transport and car clubs where the conditions support such measures.

5.25 For more information on Oxfordshire County Council's requirements with regard to Residential Travel Plans please see appendix 8.

5.26 Retail Travel Plans or Travel Plans for sites which will attract customers or visitors will be required to include data, surveys, objectives, targets, actions and monitoring for customers / visitors, as well as staff. These types of Travel Plan

should be developed with the aim of reducing customer / visitor single occupancy car use to the site as well as reducing the percentages of staff travelling by car.

Implementation

Timescales for Implementation

5.27   Once a Travel Plan Statement or Travel Plan has been submitted and approved, it is ready to be implemented. The role of the Travel Plan Co-ordinator is vital in managing the implementation of the measures within the Plan, marketing its aims and successes and monitoring progress. It is the responsibility of the developer to ensure that a Travel Plan Coordinator is resourced and appointed, and retained to cover the required monitoring. For further details on this role see Appendix 5, paragraphs A34 to A41.

5.28   Certain measures within the Travel Plan or Travel Plan Statement must be implemented before occupation; for example, highlighting sustainable travel options associated with a residential development to potential home buyers through the marketing process.

5.29   Measures that can not be implemented before occupation must be introduced as soon as the site is occupied. If a critical mass of occupiers is required before it is possible to introduce a particular measure, different stages of the Travel Plan / Travel Plan Statement may be implemented in phases over a longer period of time. Developers are required to highlight this issue in the Travel Plan or Travel Plan Statement if it is relevant to their development.

Responsibility for Implementation

5.30   The Travel Plan must be capable of securing long-term action, therefore it needs to be implemented and managed so that, as far as possible, it becomes self-sustaining. Therefore, before planning permission for a development has been granted, there needs to be clarity about where ownership for the Travel Plan and its implementation lies.

5.31   *For residential developments* the overall responsibility for implementing the Travel Plan or Travel Plan Statement lies with the developer from first construction of the development to at least five years after 100% occupation. After that, implementation becomes the responsibility of a person or group associated with the site, such as the Travel Plan Co-ordinator, Site Management Company or Residents' Association. The details of this transfer of responsibility should be sent to the Travel Plans Team within the Council's Transport Development Control Group.

5.32 **For all other developments,** overall responsibility for the Travel Plan or Travel Plan Statement lies with the landowner for at least five years after first occupation. The Travel Plan belongs to the site; therefore if there is a change of occupier the Travel Plan must continue but may need reviewing to address the needs of the new occupier. If any amendments are made, the objectives should remain generally with the same as the objectives of the original plan and must be agreed with the Travel Plans Team within the Council's Transport Development Control Group. In addition, a copy of the amended Travel Plan must be sent to the Travel Plans Team.

5.33 Where the owner and occupier are from different organisations, participation in the Travel Plan must be made a requirement of occupation within the terms of the lease. This is especially important in multi-occupier sites where the participation of a range of tenants is necessary.

5.34 If you would like advice on implementing your Travel Plan or support with specific measures please refer to appendix 11.

Monitoring and Review

5.35	After the baseline Travel Plan survey has taken place, surveys must be repeated on a biennial basis (usually in years 1, 3 and 5) and the results sent to the Travel Plans Team within Transport Development Control at Oxfordshire County Council. This will enable the Travel Plan Co-ordinator and the County Council to keep track of the progress that the Travel Plan is making against its targets.

5.36   Surveys should be repeated at the same time of year to allow for a more reliable comparison and to avoid the influence of seasonal variations.

5.37   Survey and analysis templates have been developed by Oxfordshire County Council and we strongly recommend that they are both used as part of ongoing monitoring of Travel Plans as the two are designed to work together. They can be obtained by contacting the Travel Plans Team. Please refer to appendix 15 for contact details.

5.38	A number of different survey and analysis templates have been created to suit different types of development. **Developers must use these templates to fulfil their monitoring obligations, rather than developing their own surveys.** Templates are available from the Travel Plans Team – please refer to appendix 15 for contact details. After each survey, the results must be analysed using the analysis template and the results sent to the Travel Plans Team at Oxfordshire County Council. For more information please see Appendix 9.

5.39   Appropriate response rates to surveys must be obtained. Information on response rates can be found in appendix 10.

5.40	Following each survey, the measures within the Travel Plan should be reviewed and adjusted if necessary to improve performance. Any changes to measures or targets must be agreed with the Travel Plans Team at Oxfordshire County Council.

5.41	If targets are not met at the end of the initial period of monitoring; the Travel Plan must be reviewed, new measures introduced and monitoring extended for another two cycles; for example where monitoring has taken place in Year 1, 3 and 5, if targets have not been met monitoring must continue in years 7 and 9.

Travel Plan Costs

Travel Plan Monitoring Fees

5.42 In all cases where a Travel Plan is required, a Travel Plan monitoring fee will be payable to the Council by the developer. This does not apply to Travel Plan Statements or Voluntary Travel Plans. Please see appendix 12 for details of the Travel Plan Monitoring fees in Oxfordshire.

5.43 In regards to extension to existing developments, the Travel Plan must cover the whole site, not just the extension. Therefore, the Travel Plan monitoring fee must also cover the whole site rather than just the extension.

5.44 Guidance on local authorities' ability to use fees is available in DfT/CLG's *Delivering Travel Plans through the Planning Process.* In addition, Section 93 of the Local Government Act 2003 gives the power to local authorities to charge for discretionary services. These are services that an authority has the power, but not a duty, to provide.

5.45 The Travel Plan monitoring fees shown in appendix 12 would be used to cover biennial monitoring over five years of the life of the Travel Plan and are based on Oxfordshire County Council officer time to do the following:

- Make records and set up systems to ensure monitoring takes place at appropriate times
- review monitoring outputs
- review the Travel Plan progress in light of monitoring results, and
- discuss the results and future measures with the Travel Plan Co-ordinator for the site.

5.46 The fee does not cover the actual conduct of surveys, data inputting or analysis as this is the responsibility of the Travel Plan Coordinator.

5.47 In some cases, particularly for residential developments, monitoring may be required beyond the five year period. In these circumstances, fees required beyond five years will be agreed on a case by case basis.

5.48 For mixed use developments, the monitoring fee will be the sum of the relevant charges for each separate use class element of the development.

5.49   The full fee amount should be submitted in one payment on signing the Section 106 agreement.

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Travel Plan Contributions

5.50   Developments with a Travel Plan may be required to make an additional contribution to Oxfordshire County Council if the terms of a Section 106 agreement relating to the Travel Plan are not met.

5.51   Whether this will apply to a particular development and the amount required will be agreed on a case-by-case basis with Oxfordshire County Council at the time of defining the terms of the Section 106 agreement.

Appendix 1: Thresholds

Land use	Description	Transport Statement and Travel Plan Statement	Transport assessment and Travel Plan
A1 Food retail	Retail sale of food goods to the public: • food superstores; • supermarkets; and • convenience food stores.	250 - 999 m^2 GFA	1000 m^2 GFA and over
A1 Non-food retail	Retail sale of non-food goods to the public: • includes sandwich bars – sandwiches or other cold food purchased and consumed off the premises • internet cafés.	800 - 1499 m^2 GFA	1500 m^2 GFA and over
A2 Financial and professional services	Financial services, including: • banks; • building societies • bureaux de change Professional services (other than health or medical services) including: • estate agents; and • employment agencies Other services-: betting shops, principally where services are provided to visiting members of the public.	1000 - 2499m^2 GFA	2500 m^2 GFA and over
A3 Restaurants and cafés	Restaurants and cafés selling food to be eaten on the premises. Excludes internet cafés (now A1).	300 - 2499 m^2 GFA	2500 m^2 GFA and over
A4 Drinking establishments	• public houses; • wine-bars; or • other drinking establishments.	300 - 999 m^2 GFA	1000 m^2 GFA and over
A5 Hot food takeaway	Hot food eaten on or off the premises.	250 - 999 m^2 GFA	1000 m^2 GFA and over
B1 Business	(a)Offices (not included in Class A2) (b) Research and development, including: • laboratories; and • studios. (c) Light industry.	1500 - 2499 m^2 GFA	2,500 m^2 GFA and over
B2 General industrial	General industry (not included in B1). The former 'special industrial' use classes (B3 to B7), are now all included in B2.	2500 - 3999m^2 GFA	4000 m^2 GFA and over
B8 Storage or distribution	Storage or distribution centres: • wholesale warehouses; • distribution centres; • repositories.	–2000 to 2999 m^2 GFA	3000 m^2 and over GFA
C1 Hotels	Includes: • hotels; • boarding houses; and	75 - 99 bedrooms	100 bedrooms and over

Land use	Description	Transport Statement and Travel Plan Statement	Transport assessment and Travel Plan
	• guest houses, 'no significant element of care is provided'.		
C2 Residential institutions - hospitals, nursing homes	Residential accommodation and accommodation providing care to people.	30 - 49 beds	50 beds and over
C2 Residential institutions – residential education	• boarding schools • training centres.	50 - 149students	150 students and over
C2 Residential institutions – institutional hostels	• homeless shelters; • accommodation for people with learning difficulties • accommodation for people on probation.	250 - 399 residents	400 residents and over
C3 Dwelling houses	Includes dwellings for individuals, families, or not more than six people living together as a single household. Not more than six people living together includes: • students or young people sharing a dwelling; • small group homes for disabled or handicapped people living together in the community.	50 - 79 dwellings	80 dwellings and over
D1 Non-residential Institutions	Medical and health services: • clinics and health centres; • crèches; • day nurseries; and • day centres and consulting rooms (not attached to the consultant's or doctor's house) • museums; • public libraries; • art galleries; • exhibition halls; and • non-residential education and training centres • Places of worship, religious instruction and church halls.	500 - 999 m^2 GFA	1000 m^2 GFA and over
D2 Assembly and Leisure	• cinemas; • dance and concert halls; • sports halls; • swimming baths; • skating rinks; • gymnasiums; • bingo halls; • casinos • other indoor and outdoor sports and leisure uses not involving motorised vehicles or firearms.	500 - 1499 m^2 GFA	1500 m^2 GFA and over
Others	for example: stadium; retail warehouse clubs; amusement arcades; launderettes; petrol filling stations; taxi businesses; car and vehicle hire; businesses selling and displaying motor vehicles; nightclubs; theatres;	Discuss with Highway Authority	Discuss with Highway Authority

Land use	Description	Transport Statement and Travel Plan Statement	Transport assessment and Travel Plan
	hostels; builders' yards; garden centres; post offices; travel and ticket agencies; hairdressers; funeral directors; hire shops; and dry cleaners.		
Additional Considerations			
	New Schools		Required
	Development proposals not conforming to adopted development plan		Required
	Development proposals generating more than 30 two way vehicular movements in any hour, or more than 100 two way vehicular movements in 24 hours, or more than 100 parking spaces		Required
	An extension to an existing development that causes the total travel impact or size of the site to exceed the threshold for a Travel Plan		Required
	Changes to schools		Discuss with Highway Authority
	Any traffic generating development in, or within 100 metres of an air quality management area (AQMA)		Discuss with Highways Authority
	Any development that lies within an area (or along a corridor) which has been identified by Oxfordshire County Council for the delivery of specific initiatives or targets for the reduction of traffic, or the promotion of walking, cycling and public transport		Discuss with Highways Authority
	Development that is likely to exacerbate local congestion and safety problems		Discuss with Highways Authority
	Where developments and/or their access routes are adjacent to Sites of Special Scientific Interest etc.		Discuss with Highways Authority

NOTE: for mixed use developments, the threshold will apply to each use element of the site. However, we will require a framework travel plan covering all uses to accompany outline planning applications for mixed use developments,

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Appendix 2: Transport Statement Form

Please e-mail the completed form, maps and drawings to
transport.development.control@oxfordshire.gov.uk

Planning Application No.

Contact Information			
Developer		**Consultant**	
Company:		**Company:**	
Address:		**Address:**	
Contact person:		**Contact person:**	
Tel:		**Tel:**	
E-mail:		**E-mail:**	

Development Details	
Brief Description of the development	
Description of the location (Please attach a location map in .pdf format when submitting this form)	
Postcode	
Number/Street Name/Road	
Town	
Size (GFA/no of units)	
Planned date of opening	
Land Use Information	
Description of existing use of land **- Constraints of existing highway network** **- Planning History** **- Extant uses**	

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Traffic Data	

Existing traffic volume level on adjacent road network?
Cars: **peak hourly two way flow**
            average 12 hour two way flow
HGVs: **peak hourly two way flow**
            average 12 hour two way flow
Cycles: **peak hourly two way flow**
            average 12 hour two way flow	

Traffic generation from the site?
Cars: **peak hourly two way flow**
             average 12 hour two way flow
HGVs: **peak hourly two way flow**
            average 12 hour two way flow
Cycles: **peak hourly two way flow**
            average 12 hour two way flow
Pedestrians **peak hourly two way flow**
            average 12 hour two way flow	

Existing car-parking levels for each land use (on and off street)? **Proposed car-parking levels for each land use (on and off street)?**	
General description of how facilities for people with mobility problems will be tackled:	
Any other relevant information:	
Describe and highlight any changes which will result from the application of the Travel Plan Statement	

Thank You

Please e-mail the completed form and site location map to
transport.development.control@oxfordshire.gov.uk

Please note that location map submitted in .pdf format clearly shows:
- o *locations of new/modified accesses of development onto existing road network*
- o *existing bus stops and locations of transport interchanges in area*

Please note that plans are submitted in .pdf format clearly shows:
- o *each new/modified accesses showing carriageway widths, footpaths and visibility standards*
- o *all parking spaces (on street and within development area) and turning areas where applicable*
- o *private land and public highway*

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Appendix 3: Scoping for Transport Assessments Form

Please e-mail the completed form to
transport.development.control@oxfordshire.gov.uk

Planning Application No.

Contact Information			
Developer		**Consultant**	
Company:		**Company:**	
Address:		**Address:**	
Contact person:		**Contact person:**	
Tel:		**Tel:**	
E-mail:		**E-mail:**	

Development Details	
Brief Description of the development	
Description of the location (Please attach a location map in .pdf format when submitting this form)	
Postcode	
Number/Street Name/Road	
Town	
Size (GFA/no of units)	
Planned date of opening	

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Consultant (name, address and contact details)	
Applicant (name, address and contact details)	
Site/ Development name and address)	

Description of existing use of land
   -   Constraints of existing highway network
   -   Planning History
   - Extant uses	

If some or all existing land uses are being relocated then where to?	
Approximate traffic volume level on adjacent road network? (peak hourly two way flow, average 12 hour two way flow)	
Distribution /Assignment method to be used? How will this be done? i.e. Gravity model, or based on existing turning movements	

How will potential traffic generation from the site be established?
   -   TRICS
   - Special surveys?	

Estimated Modal Splits: Initial estimate of target Modal Splits:	
Period of assessment? (peak periods of development and/or network)	
Locations of new/modified accesses of development onto existing road network? (supply plan of development area, road network and access locations)	
Describe committed development to be taken into account:	
Area of impact (based on proposed development levels, existing traffic levels and existing congestion) (supply plan of development area, road network and access locations)	
When will site become fully operational?	
Will the development be split into phases? If so supply plan of phases and timescales.	
Will construction traffic be significant? If so how is this dealt with and will it need specific haul routes?	

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What are the assessment years?
    Existing
    Year of opening
    Design Year
Any other sensitivity tests required e.g. phasing	

Car-parking levels for each land use (on and off street)?	
Provide plan of real travel 5km isochrones (cycling)	
Provide plan of real travel 2km isochrones (walking)	
Provide plan of existing bus stops and locations of transport interchanges in area	

Road Safety- Accident records
   -   Examination of historical data normally 3/5 years
   -   Safety audit needed for changes to highway layout?
(supply plan with recorded accident injury data)	

General description of how facilities for people with mobility problems will be tackled:	

Policy issues
   -   Is proposal in line with current national policy?
   -   Is development proposal in line with regional and local plan policies?
   - Is the development included in the current development plan?	

Any other relevant information:	

Thank You

Please e-mail the completed form and site location map to
transport.development.control@oxfordshire.gov.uk

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Appendix 4: Travel Plan Statement

Please e-mail the completed form and site location map to
transport.development.control@oxfordshire.gov.uk

Planning Application No.

Contact Information			
Developer		**Consultant**	
Company:		**Company:**	
Address:		**Address:**	
Contact person:		**Contact person:**	
Tel:		**Tel:**	
E-mail:		**E-mail:**	

Development Details	
Brief Description of the development	
Description of the location (Please attach a location map in .pdf format when submitting this form)	
Postcode	
Number/Street Name/Road	
Town	
Size (GFA/no of units)	
Planned date of opening	
Travel Information	
Anticipated number of site occupants (week day and weekends, per day)	
Anticipated number of staff (week day and weekends, per day)	
Anticipated number of visitors (week day and weekends, per day)	
Please insert information here concerning any expected deliveries to the site	
Number of car parking spaces will be provided	

within site boundary	
Number of delivery parking spaces (and size) will be provided within site boundary	
What facilities are there for pedestrians – on site and off site? E.g. pavements, crossings, lighting, signage etc	
What facilities are there for cyclists – on site and off site? E.g. on-road or off-road cycle lanes.	
Number of cycle parking spaces that will be provided and where will it be provided?	
Will the cycle parking be covered? If not will it be covered in the future?	
Please provide information on bus services in the vicinity of the site e.g. routes, frequencies	
How far are the nearest bus stops from the development and where are they located?	
Please provide information on train services in the vicinity of the site e.g. routes, frequencies	
How far is the nearest train station from the development and where is it located?	
Please outline any specific issues raised in the Transport Statement and explain how this Travel Plan Statement will address them	

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Travel Plan Statement Objectives
All Oxfordshire County Council Travel Plan Statements should have the following key objectives: • **To reduce the need to travel to and from the development** • **To reduce single occupancy car travel to and from the development** • **To promote walking as a healthy and sustainable way of travelling to and from the development** • **To promote cycling as a healthy and sustainable way of travelling to and from the development** • **To encourage the use of public transport where walking and cycling are not possible**

Please insert any additional site specific objectives here	•
Measures and Initiatives	
The appointment of a person to be responsible for the implementation of measures is essential. Please insert their name and contact details here if known. If not, please insert information on how and when this person will be identified.	Name: Address: Phone Number: E-mail address:
How will the objectives of the Travel Plan Statement be promoted to the site occupants and visitors?	• For example, through the use of marketing materials and promotional activities

In the section below, please describe the measures which will be implemented to achieve each of the Travel Plan Statement's objectives outlined above. **Please describe at least three measures for each objective.**	
Measures to reduce the need to travel to the development	
Measures to reduce single occupancy car use to the development	
Measures to promote walking as a way to travel to the development	
Measures to promote cycling as a way to	

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travel to the development	
Measures to promote public transport as a way to travel to the development	
Please insert any additional measures to support any site specific objectives here.	
Monitoring and Review	
The measures identified within this Travel Plan Statement should be regularly reviewed and updated where necessary. This will help to ensure that the aims of the Statement are successfully achieved.	
What will be the date of the first review? (Month and Year)	

Thank You

Please e-mail the completed form and site location map to
transport.development.control@oxfordshire.gov.uk

Please note that location map should be submitted in .pdf format and clearly show the development and all of the main features referred to in the statement above e.g. bus stops, pedestrian routes etc.

Appendix 5: Full Travel Plans

A Full Travel Plan should contain the following information:
(Please number all paragraphs, tables, diagrams etc)

Cover Page
A.1   Type of Travel Plan

A.2   Planning application number

A.3   Name and contact details of the Travel Plan author and site owner / developer

A.4   Date of submission

Introduction
A.5   Overview of the development site & organisation.

Background
A.6   Full address of the development location

A.7   Location map of the development & surrounding area

A.8   A site plan

A.9   A written description of the location of the development.

A.10   Size of the development (GFA / number of units).

A.11   Planned / estimated date of occupation.

A.12   Expected occupancy levels (staff / visitors / customers / residents).

Travel Plan data
A.13   The survey information and data contained in a Full Travel Plan will vary depending on the development and what stage in the planning process it has reached.

A.14   Most Full Travel Plans will be produced prior to planning permission and occupation, where the proposed use and site occupiers are known. Other Full Travel Plans will be produced after the site is occupied. This will affect the type of data which should be included. Advice on this is available from The Travel Plans Team at Oxfordshire County Council.

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A.15   In summary, Full Travel Plans should contain one of the following two types of travel data:
- Data from current site users if the site and / or organisation already exists
- For new developments, data from similar sites and developments from sources such as TRICS or the census.

A.16   A description of all **anticipated / existing** travel to the site is required in the Travel Plan. It should include:

- forecasted trip generation for the development (AM & PM peaks) from a source such as TRICS (or extrapolated from current usage if applicable)
- modal split data
- important variations in travel patterns according to time of day, day of the week or time of year (include information on working hours and shifts for workplaces, journeys made from the site to other locations during the day and anticipated deliveries)
- cycle parking provision (amount and type) and, if the site is occupied, levels of cycle parking use
- car parking provision and, if the site is occupied, levels of car park use
- a description of facilities for walking, cycling, public transport, car use and car share on the development and in the wider area around the development
- a description of any barriers to increasing walking, cycling, the use of public transport and car share
- for residential developments - information on the likely travel destinations for residents, as well as distances and transport links to these e.g. nearest shopping centre, schools, other facilities, key employers in the area etc
- if the site is occupied, postcode analysis and discussion about where site users are travelling to and from, and by which modes
- if the site is occupied, discussion of survey results, distance data & potential for reducing car use and increasing alternative modes of travel.

Baseline survey
A.17   All Travel Plans should contain a commitment to conduct a new baseline survey and review the Travel Plan in light of the survey results within three months of occupation or, for residential developments, once a certain percentage of the site is occupied (to be agreed with Oxfordshire County Council).

A.18   Template surveys for different types of organisation and different types of user (staff, visitors, students, residents) have been developed by Oxfordshire County Council and can be downloaded from the County Council website or obtained by contacting the Travel Plans Team. Information on the sample sizes required

to ensure that the data collected is accurate and representative can be found in appendix 8.

A.19   The results of the baseline travel surveys should be analysed using a template available from the Travel Plans Team and submitted to Oxfordshire County Council within one month of the survey completion.

Objectives
A.20   Concise terms should be included which outline the overall objectives of the Travel Plan.

A.21   Objectives should aim to reduce the need to travel, reduce car use and increase the use of sustainable modes of travel.

Targets
A.22   Targets should be SMART (Specific, Measurable, Achievable, Realistic, and Time bound).

A.23   Objectives and targets are essential in helping to guide and measure the outcomes of the Travel Plan i.e. the difference it has made to the travel habits of the users of the site. Therefore, something like "Provide Travel Information Packs to all residents by October 2011" is an example of an action rather than a target. An example of a target would be "To reduce the percentage of staff travelling to work by single occupancy car by 10% by year 3 of the Travel Plan".

A.24   Modal split targets should be set; i.e. a target should be set to reduce the percentage of site users (staff, visitors, students, residents) travelling to / from the site by car compared to the anticipated car use / initial baseline survey. It also means that targets should be set to increase the percentage of travel by other modes including walking, cycling, public transport and car share. The combination of these targets for each mode should add up to 100% in total.

A.25   Targets must be set for each year in which monitoring is to take place, i.e. on a biennial basis for a period of five years minimum, although some will need to cover a longer period of time, particularly residential developments.

A.26   Benchmarking is important in informing targets, but it has to be recognised that each site is unique. Information that can be used to assist in benchmarking includes: trip generation databases, e.g. TRICS; information about trips generated from similar types of development in the same area; information about levels of car use and ownership in the area of the development e.g. census data on modal share of driving for journeys to work; levels of car ownership; information about the specific nature of the development and the

usual level of person trips (i.e. by all modes) likely to be associated with such a development (DfT, 2009).

A.27   Where a development is phased, intermediate targets should be specified.

A.28   Retail Travel Plans or Travel Plans for sites which will attract customers or visitors will be required to include data, surveys, objectives, targets, actions and monitoring for customers / visitors, as well as staff. These types of Travel Plan should be developed with the aim of reducing customer / visitor single occupancy car use to the site as well as reducing the percentages of staff travelling by car.

Measures

A.29   Measures must be appropriate for the development in question and form a package of actions with credible potential to achieve the stated objectives and targets in the Travel Plan. They must consist of a mixture of short, medium and long term actions (pre- and post-occupation) and include positive incentives to encourage the use of alternatives to the car as well as some demand restraint.

A.30   Measures should also address any specific issues raised in the Transport Assessment.

A.31   Measures to reduce the need to travel, reduce car use and encourage walking, cycling and public transport use are suggested in appendix 11.

A.32   The Travel Plan should include a mixture of 'soft measures' to raise awareness of and promote sustainable modes of travel, and 'hard measures' to ensure that the infrastructure to support walking, cycling and public transport use is in place.

A.33   When describing measures, please state which objective / target they relate to, specify the action, and when it will be completed. An example is shown in the table below.

Example of Travel Plan Measures

Target	Measure	Timescale
To increase the percentage of staff cycling to work from	Prepare and display information on cycle routes and facilities to and from the development.	Pre-occupation and ongoing long term

45 people (30%) to 60 people (40%) by 2014	Provide secure, covered, convenient and visible cycle parking	Pre-occupation
	Purchase pool bikes so that people without their own bike can cycle	Short term
	Introduce a staff cycle purchase scheme	Ongoing – long term

Management

A.34   Travel Plans should include evidence of senior management endorsement (not applicable to Residential Travel Plans).

A.35   There should also be a commitment to identify / recruit a Travel Plan Co-ordinator prior to construction of the development.

A.36   The role of the Travel Plan Co-ordinator and their responsibilities should be outlined in the Travel Plan. Their task is to drive every aspect of the Travel Plan forward. This includes implementing measures and initiatives, marketing activities, maintaining enthusiasm for the plan, monitoring and evaluating performance, assessing whether targets have been met and regularly updating the Travel Plan to reflect any changes. They are also responsible for liaising with external parties such as Public Transport Operators and Oxfordshire County Council.

A.37   Information should also be provided to explain how the Travel Plan Co-ordinator will be identified / recruited. For example, will they be a member of staff, funded by the developer or an individual identified in a resident's association (depending on the type of development)? The Travel Plan Co-ordinator may be full or part-time as appropriate to the size of the development.

A.38   In cases where units are leased out to occupiers, the appointment of a Travel Plan Co-ordinator should be a contractual requirement of the development and form a condition of the tenant's lease.

A.39   For large and complex developments dealing with thousands of people travelling to the site, the Travel Plan Co-ordinator role is expected to be at management level and to have control of a budget dedicated to the Travel Plan.

A.40   The Travel Plan Co-ordinator role can be provided from within the organisation or through a consultancy.

A.41   The name and contact details of the Travel Plan Co-ordinator should be sent to the Travel Plans Team as soon as they have been identified.

Monitoring and Review

A.42   This section of the Travel Plan should include details of how the progress of the Travel Plan will be monitored and reviewed.

A.43   The Travel Plan should also contain a commitment to monitoring of the Travel Plan at least every two years (for example, in Years 1, 3 and 5 or for longer if requested), using survey templates provided. The survey results should be analysed using a template available from the Travel Plans Team and submitted to Oxfordshire County Council within one month of the survey completion.

A.44   For residential developments there should be a commitment to monitoring at least every two years, starting once a certain percentage of the site is occupied (to be agreed by Oxfordshire County Council) and continuing for at least five years after 100% occupation.

A.45   If targets are not met at the end of the initial period of monitoring, the Travel Plan should be reviewed, new measures introduced and monitoring extended for another two cycles; for example where monitoring has taken place in Year 1, 3 and 5, if targets have not been met monitoring should continue in years 7 and 9.

A.46   Once it has been approved, any changes to the Travel Plan, in particular the targets, must be made in agreement with the Travel Plans Team at Oxfordshire County Council.

Appendix 6: Interim Travel Plans

An Interim Travel Plan should contain the following information:
(Please number all paragraphs, tables, diagrams etc)

Introduction

A.47   Type of Travel Plan

A.48   Planning application number

A.49   Name and contact details of the Travel Plan author and the site owner / developer

A.50   Date of submission

A.51   A statement regarding the commitment to produce a Full Travel Plan for the development prior to occupation.

Background

A.52   Background information on the development including development type, size, address and location map, description of the location of the development.

A.53   A plan of the site (existing site, if relevant, and new development areas).

A.54   Planned / estimated date of occupation.

Transport Data

A.55   Information about the on-site and off-site infrastructure and facilities for people travelling on foot, by bike, by public transport, by car and car share.

A.56   A description of any barriers to increasing walking, cycling, the use of public transport and car share.

A.57   Inclusion of modal split census data for the area (journey to work).

A.58   A commitment to conduct baseline travel surveys for the development within three months of occupation, to send the results to the Travel Plans Team and to review the Travel Plan in light of the survey results.

Aims and Objectives

A.59   A statement outlining the overall aims of the Travel Plan to reduce car use to the development and promote sustainable modes of travel.

A.60   Details of possible measures (behaviour change measures and infrastructure) to be implemented prior to the occupation.

A.61   A summary of possible measures to be included in a Full Travel Plan aimed at reducing car travel to the development.

A.62   A commitment to recruit a Travel Plan Co-ordinator prior to occupation and a description of how they will be recruited / funded.

A.63   A commitment to send the name and contact details of the Travel Plan Co-ordinator to the Travel Plans Team.

A.64   A description of the role and responsibilities of the Travel Plan Co-ordinator.

Monitoring and Review

A.65   Details of the arrangements in place for monitoring and review of the Travel Plan, using the monitoring templates required. This should include a commitment to biennial Travel Plan monitoring over a minimum of five years.

A.66   A commitment to submit the results of biennial monitoring to Oxfordshire County Council within one month of survey completion.

Appendix 7: Framework Travel Plans

A Framework Travel Plan should contain the following information:
(Please number all paragraphs, tables, diagrams etc)

Introduction
A.67   Type of Travel Plan

A.68   Planning application number

A.69   Name and contact details of the Travel Plan author and the site owner / developer.

A.70   Date of submission

Background
A.71   Background information on the development including address, development type, size, location map, site plan.

A.72   A commitment that each occupier will produce a full subsidiary travel plan within 3 months of occupation.

A.73   Anticipated numbers of occupiers (organisations, residents, staff, visitors etc).

A.74   Planned / estimated date of occupation.

Transport Data
A.75   Information about the on-site and off-site infrastructure and facilities for people travelling on foot, by bike, by public transport, by car and car share (include amount, type and location of cycle parking, provision of showers and lockers for staff, number of car parking spaces etc).

A.76   A description of any barriers to walking, cycling, use of public transport and car share.

A.77   The inclusion of modal split census data for the area (journeys to work) and anticipated numbers of car trips per day.

Aims and Objectives
A.78   Overall outcomes & targets for the entire site including targets for maximum allowable levels of car trips generated by the development per day.

A.79 Details of site-wide measures (behaviour change and infrastructure) aimed at reducing single occupancy car travel generated by the development to be included in Framework Travel Plan.

A.80 Inclusion of measures to be implemented before occupation.

A.81 Details of arrangements for central administration of the Framework Travel Plan.

A.82 A commitment to ensure that a Travel Plan Co-ordinator will be identified / recruited prior to occupation.

A.83 A description of how the Travel Plan Co-ordinator will be recruited / how they will be funded.

A.84 A commitment to send the name and contact details of the Travel Plan Co-ordinator to the Travel Plans Team.

A.85 A description of the role and responsibilities of the Travel Plan Co-ordinator

A.86 A commitment that each occupier will identify a representative who will liaise with the site Travel Plan Co-ordinator and implement Travel Plan measures specific to their employees / visitors.

A.87 Details of how many subsidiary Travel Plans will be developed for the site:
- who will be responsible for these?
- how will the process be achieved?
- steps that are proposed to ensure that subsidiary Travel Plans are consistent with the wider targets & requirements of the Framework Travel Plan

A.88 Clarification (as far as possible) of the timescales for completion of individual Travel Plans & the implementation of specific measures within them as the development proceeds, including management & review.

Monitoring and Review
A.89 Details of the arrangements in place for the monitoring & review of the Framework Travel Plan, using the monitoring templates required.

A.90 A commitment that each occupier will use the templates provided by Oxfordshire County Council to conduct a travel survey for the development within 3 months of occupation and review the Travel Plan in light of the survey results.

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A.91   Commitment to biennial monitoring for a minimum of five years and submission of the results to the Travel Plans Team.

A.92   A commitment to send the results of all travel surveys to the Travel Plans Team at Oxfordshire County Council within one month of survey completion.

Appendix 8: Residential Travel Plans

A.93   Sustainable Travel Information Packs must be provided to each household in residential developments of over 10 dwellings. As a minimum this should contain information on the alternatives to single-occupancy car use available to residents, walking and cycling route maps, discounts, public transport information, the contact details of the Travel Plan Co-ordinator for the site and useful resources such as the Transport Direct Journey Planner website (please refer to appendix 13 for details) to enable people to plan their own journeys. A copy of the Travel Information Pack should be sent to the Travel Plans Team for approval in writing prior to use.

A.94   Personalised Travel Planning must be delivered to all households in residential developments of over 50 dwellings. As a minimum this should include the provision of sustainable travel information to individuals, plus face-to-face meetings using techniques such as motivational interviewing to have discussions about the travel choices available to them. Personalised Travel Planning should be funded by the developer and the methodology approved in writing by the Travel Plans Team as part of the Residential Travel Plan. Personalised Travel Planning for staff may also be required as part of Workplace Travel Plans.

A.95   Taster passes can be used to encourage the use of public transport to residential and other development sites. These should be provided to site users by the developer where requested by Oxfordshire County Council. Whether this is requested will depend on the circumstances of the development site and local public transport services. The number and type of passes will be discussed and agreed on a case-by-case basis.

A.96   Car clubs should be provided for residential developments where Oxfordshire County Council is of the view that the conditions are suitable to support their set-up and ongoing success. In these circumstances, measures such as the provision of infrastructure (such as marked parking bays and electric vehicle charging points for car club vehicles), the promotion of the car club, and a contribution towards the set-up costs of the car club should be provided by the developer.

Appendix 9: Survey tool and templates

A.97   Oxfordshire County Council has created a number of different survey templates to suit different types of developments and site users.

A.98   The templates provided are of two types: survey templates and analysis templates. Each survey template has an analysis template to match it, and the two are designed to work together. The role of each is as follows:

A.99   **Survey templates** are available as paper surveys (in Word format for printing) or in online format(s). They define the questions that must be asked in order to collect the required monitoring data, and provide the means of carrying out the survey (i.e. print format or on-line). Developers are free to develop their own print or online forms of the surveys, but may not change the question content unless it is specifically indicated eg, location and name.   All questions contained in a survey must be used and their wording and format may not be changed. It is acceptable to add extra questions to the survey where useful for travel planning at the site, but not to replace or re-word existing questions found in the template.

A.100   The survey is split into a baseline section and a section providing 'additional questions'.   In your baseline survey, we expect that you will simply use the baseline questions, unless you have additional infomration already about your site's travel patterns.   The additional questions are for use under specific conditions.   For example, if your baseline survey results indicate potential for modal shift to walking, then your year 1 survey should include the additional walking set of questions, in order to refine your walking targets and inform more specific actions.

A.101   **Analysis templates** are available only as Excel spreadsheets. They must be used to store and analyse the survey data collected: it is not acceptable to submit survey data in forms other than through the analysis template. As well as providing a mechanism for collection and analysis of survey data, the analysis template provides a mechanism to investigate potential to reduce car use / increase use of non-car modes, and the mechanism for determining targets for the Travel plan. Detailed guidance on using the analysis template is included in the template itself

A.102   Each survey template and analysis template pair provides all the tools needed to carry out a survey, record the results, analyse the potential to reduce car use and increase use of other modes, and set targets for the travel plan.

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Appendix 10: Response Rates

A.103 Response rates for different types of development are shown below. Unless otherwise stated, these are based upon the scenario of monitoring the total proportion of trips made by adults, by mode, and with the aim of reporting modal splits to within 2.5%. This can be expressed as:

% all trips made by adults, by mode +/- 2.5%

A.104 The minimum response rates required to achieve this monitoring aspiration have been calculated, assuming a confidence level of 95%.

A.105 Where a survey includes only a sample of individuals or households rather than the entire group, these should be sampled in an un-biased, randomised way as far as possible. A detailed description of how the survey was carried out (how the survey was administered and individuals or households were targeted to take part) must be submitted along with the results of each survey. If bias is evident in the survey design, a repeat survey may be required, or a fee may be charged for independent monitoring to be carried out.

Residential developments (distribution of surveys to households)

Number of homes being built	% of households that must respond to the survey
less than 80 houses	no survey
80 to 160	80%
160 to 240	75%
240 to 320	70%
320 to 400	65%
400 to 560	60%
560 to 720	50%
720 to 880	45%
More than 880 households	40%

Staff / Student Surveys

Number of staff / students	% that must respond
up to 100	80%
100 to 200	80%
200 to 300	75%
300 to 500	70%

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500 to 1000	65%
1000 to 1500	60%
1500 to 2000	55%
2000 to 2500	50%
2500 to 3000	45%
3000 +	40%

Visitor Surveys

Number of site visitors per week	Survey needed
Less than 100	Survey all visitors for 1 month
100 to 200	Survey all visitors for 2 weeks
200 to 500	Survey all visitors for 1 week or 70% for 1 month
500 to 2000	Survey all visitors for 1 week or 50% for 1 month
2000 - 5000	Survey 50% of visitors for 1 week or 30% for 2 weeks
5000-10000	Survey 25% of visitors for 1 week or 15% for 2 weeks
10000+	Survey 15% of visitors for 1 week or 8% for 2 weeks

Appendix 11: Travel Plan Measures

A.106 A selection of possible measures is listed below. Not all of these will be relevant to every development and therefore measures which are considered most suitable to a particular site and its occupants should be selected. Additional measures can be found in the DfT / CLG guidance *Delivering Travel Plans through the Planning Process* or the DfT's *Making Residential Travel Plans Work: Guidelines for New Development.*

Reducing the need to travel

A.107 Sustainable site design and location. This could include proximity to existing facilities/services and traffic-free play areas within residential developments.

A.108 Encourage staff to consider working from home and teleconferencing rather than travelling to meetings where possible.

A.109 Introduce a Business Travel Policy to incentivise fewer or shorter car trips.

Awareness raising and marketing

A.110 Personalised Travel Planning for residential developments of over 50 dwellings.

A.111 The availability of sustainable modes of travel, the benefits of using them and specific Travel Plan measures need to be communicated to occupiers / employees / visitors / customers through media appropriate to the organisation or site.

A.112 Set up or attend a local transport forum where shared issues and solutions can be discussed. These may also present an opportunity for partnership working.

A.113 Provide each household in a residential development with a Sustainable Travel Information. This should contain information about alternatives to car travel, the name and contact details of the Travel Plan Co-ordinator, walking and cycling maps, public transport information etc.

A.114 Provide new staff with sustainable travel information as part of their induction. This will help to ensure that sustainable travel habits are established at the earliest point in their employment.

A.115 Link in with national events such as Bike Week (please refer to appendix 13 for details).

Measures to promote walking

A.116 Permeability - Provide direct walking routes through new / extended developments to facilities and bus stops and good links to key routes outside the development. Walking routes should be as short and direct as possible. There should also be good lighting and active frontages designed into the development. To ensure walking routes are as safe, useable and desirable as possible, the following elemts should be addressed:

- Footway surfaces and obstructions
- Facilities and signage
- Maintenance and enforcement
- Personal security
- Crossing points and desire lines
- Road layout and space allocation
- Aesthetics
- Traffic

A.117 Provide information on walking routes, distances and timings. Government guidance contained in Planning Policy Guidance 13 (PPG13) is that walking is the most important mode of travel at the local level and offers the greatest potential to replace short car trips, particularly under 2 km.

A.118 Promote the health, cost and environmental benefits of walking such as reduced stress, increased physical health, reduced absenteeism, reduced CO_2 levels and reduced petrol costs. This can be achieved by walking to work or to the shops, walking at lunchtime and even walking up and down the stairs.

A.119 Encourage the formation of lunchtime walking (or running) groups.

Measures to promote cycling

A.120 Provide direct cycling routes through new / extended developments to facilities and bus stops and good links to key routes outside the development. Cycling routes should be as short and direct as possible.

A.121 Provide secure, covered, convenient and visible cycle parking.

A.122 In workplaces, provide shower and changing facilities for staff that cycle. Secure lockers can also be useful for the storage of wet weather gear and cycle helmets.

A.123 Display information on cycle routes and facilities to and from the development. PPG 13 states that cycling also has potential to substitute for short car trips, particularly those under 5 km, and to form part of a longer journey by public transport.

A.124 Encourage and enable employees to set up a Bicycle User Group to enable cyclists to discuss common issues and encourage more people to take up cycling as a healthy and sustainble commuting option.

A.125 Provide pool bikes so that people without their own bike can still cycle.

A.126 Investigate whether there are any discount bike purchase schemes available to staff who cycle.

A.127 Promote the health, cost and environmental benefits of cycling such as increased physical health, reduced absenteeism, reduced CO2 levels and reduced petrol costs. This can be achieved by cycling to work or to the shops.

Measures to promote the use of public transport
A.128 Ensure that there are good links from the development to local bus and train services i.e. direct walking routes from the development to bus stops. Nearly all public transport journeys involve an element of walking or cycling. Having good links in place ensures that the opportunity to use sustainable modes of transport when commuting is fully utilised.

A.129 Provide up-to-date public transport information including timetables for buses and rail and details of travel planning resources such as Transport Direct Journey Planner.

A.130 Provide information on public transport season tickets and possible discounts.

A.131 Subsidy / loans for season tickets for staff.

A.132 Provide taster passes or tickets to site users or households to encourage the use of public transport.

Measures to reduce car use
A.133 Offer personalised travel planning advice to occupants / employees to give them the opportunity to explore and change their travel patterns with an expert.

A.134 Promote alternatives to car travel according to what is relevant for your site's location.

A.135 Make pool cars available to staff to use for business travel so that they do not feel that they must bring their own car to work.

A.136 Adopt principles of good fleet management to ensure that the use of fleet of vehicles is as efficient as possible.

A.137 Promote health, cost and environmental benefits of switching from car to other modes, using the car more efficiently or car sharing.

A.138 Walking, cycling and public transport should be promoted first, but car sharing may help reduce single occupancy car use in cases where other modes are not an option. For information on Oxfordshire Car Share refer to appendix 13.

A.139 Provide premium car parking spaces for car sharers, for example spaces closest to their place of work, and / or provide car sharers with better parking rates / free parking where there are parking charges in effect.

A.140 Organise an alternative ride home for car sharers (and non car users) in case of an emergency, eg taxis.

A.141 Car Park Management at sites where alternative modes of travel to the car are feasible. This could include measures such as charging for car parking and using the revenue to subsidise travel plan measures; review staff and other parking entitlement; offer incentives for not using parking spaces; ration parking based on parking 'need'.

A.142 Car Clubs have the potential to reduce the need to own a car and therefore reduce the number of journeys made by car. number of car clubs are active in Oxford. Information on car clubs is available from Carplus.

Measures to promote accessibility

A.143 Measures should be included in the Travel Plan to ensure that site users have access to key local employment sites, education, facilities and services where they cannot easily access them by walking, cycling or public transport. In some cases, this might include supporting and facilitating the development of community or volunteer run minibus or car schemes. For example, an Extra Care facility or Care Home may need a daily minibus service to transport residents to their nearest local shops and facilities, which could also provide a service for local residents.

A.144 Consideration must also be given to the transport needs of disabled people, and the need for wheelchair accessible vehicles.

Appendix 12: Travel Plan Monitoring Fees

Travel Plan Monitoring Fee Thresholds

Land use	Size of development	Monitoring Fee (£)
A1 Food retail	3500m2 and over	2,040
	1000-3499m2	1,240
A1 Non-food retail	3500m2 and over	2,040
	1500-3499m2	1,240
A2 Financial & professional services	3500m2 and over	2,040
	2500-3499m2	1,240
A3 Restaurants & Cafes	3500m2 and over	2,040
	2500-3499m2	1,240
A4 Drinking Establishments	1000m2 and over	1,240
A5 Hot Food takeaway	1000m2 and over	1,240
B1 Business	5000m2 and over	2,040
	2500-4999m2	1,240
B2 General Industrial	5000m2 and over	2,040
	4000-4999m2	1,240
B8 Storage or distribution	7500m2 and over	2,040
	3000m2 to 7499m2	2,040
C1 Hotels	150 bedrooms and over	2,040
	100 to 149 bedrooms	1,240
C2 Residential institutions - hospitals, nursing homes	75 beds and over	2,040
	50 to 74 beds	1,240
C2 Residential institutions – residential education	225 students and over	2,040
	150 to 224 students	1,240
C2 Residential institutions – institutional hostels	600 residents and over	2,040
	400 to 599 residents	1,240
	400 or more homes	Discuss with Highways Authority: £2,040 unless monitoring is required after year 5.
C3 Dwelling Houses	200 to 399 homes	Discuss with Highways Authority: £1,240 unless monitoring is required after year 5.

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	80 to 199 homes	Discuss with Highways Authority: if travel plan is required, £1,240 unless monitoring is required after year 5.
D1 Non residential institutions	1500m2 and over	2,040
	1000 to 1499m2	1,240
D2 Assembly & Leisure	2250m2 and over	2,040
	1500m2 and over	1,240
Others	Discuss with Highways Authority	

The fee amount to cover biennial monitoring over five years of the life of the Travel Plan has been calculated using the assumptions below:

Higher rate: 51 hours at £40 per hour, to cover initial checks and set up, and monitoring in years 0, 1, 3 and 5

Lower rate: 31 hours at £40 per hour, to cover initial checks and set up, and monitoring in years 0, 1, 3 and 5.

Fee may be higher if it is decided that monitoring needs to extend beyond year 5.

Appendix 13: Sources of further information

A.145 Further information on travel planning can be found in the following publications:

- Delivering Travel Plans through the Planning Process (DfT / CLG, 2009)
- Building Sustainable Transport into New Developments (DfT, 2008)
- The Essential Guide to Travel Planning (DfT, 2008)
- Guidance on Transport Assessments (DfT & CLG, 2007)
- The Travel Plan Resources Pack for Employers (DfT, 2006)
- Making Residential Travel Plans Work: Guidelines for New Development (DfT, 2005)
- Behavioural Insights Tool Kit, Social Research and Evaluation (DfT, 2011)

A.146 The websites below are also good sources of information:

- ACT Travelwise: www.acttravelwise.org
- Car clubs: www.carplus.org.uk/car-clubs/
- Living Streets: www.livingstreets.org.uk
- Oxfordshire Lift Share: www.oxfordshire.liftshare.com
- Sustrans: www.sustrans.org.uk
- Transport Direct: www.transportdirect.info
- Traveline: www.travelinesoutheast.org.uk
- Bike Week: www.bikeweek.org.uk

Appendix 14: Policy References

A.147 The policies outlined below have particular relevance to Travel Plans and the planning process at national, regional and local levels.

National Policy

National Planning Policy Framework (NPPF), Department of Communities and Local Government, 2012

A.148 The requirement for Transport Assessments and Travel Plans is set out in the National Planning Policy Framework (NPPF) (Department of Communities and Local Government, March 2012). Paragraph 32 states that: 'All developments that generate significant amounts of movement should be supported by a Transport Statement or Transport Assessment'. Paragraph 36 states that 'All developments which generate significant amounts of movement should be required to provide a Travel Plan'.

Transport White Paper: Creating Growth, Cutting Carbon. Making Sustainable Local Transport Happen (January, 2011)

A.149 The White paper set out the vison for a sustainable transport system that is an engine for Economic Growth while also promoting a green and safer quality of life for the local commuinity.

A.150 It recognises the need to reduce the carbon emitted by transport in order to meet our national binding commitments. It highlights that two thirds of trips made by motor car are less than five miles: trips that could be be made by other transport modes if practical alternatives were available.

A.151 It outlines the strategy to achieve this by reducing the emissions from private car trips through technological changes over the longer term, investment in key rail infrastructure and by making it easier to access non car modes for local trips, with high quailty public transport routes and good walking and cycling links.

A.152 It recognises that a top-down, one-size-fits-all approach does not work in funding sustainable transport projects, therefore the Government has made funding available for for local sustainable travel initiatives through the Local Sustainable Transport Fund.

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DfT strategy for sustainable transport: Door to Door: A Strategy for Improving Sustainable Transport Integration, March 2013

A.153 As part of its commitment to carbon reduction, the Government wants more journeys made by sustainable modes. For this to happen there is a need to join up all aspects of the trip, and the Door to Door Strategy outlines how this can be made to happen.

A.154 The travel planning process fits in to this strategy with the provision of information about how sites can be accessed by non car modes where practial.

Local Policy

Oxfordshire Local Transport Plan: 2011 – 2030 (Oxfordshire County Council, 2011)

A.155 The aims of *Transport for New Developments: Transport Assessments and Travel Plans* are closely linked to, and will assist the County Council in successfully achieving, the following LTP3 policies and objectives:

- **Policy G3:** Oxfordshire County Council will work to ensure that the transport network can meet the requirements of the county's world class economy whilst protecting the environment and the amenity of Oxfordshire residents.
- **Policy G5:** Oxfordshire County Council will support sustainable, healthy and inclusive modes of travel and promote changes in travel behaviour to these modes.
- **Policy SD1:** Oxfordshire County Council will seek to ensure that:

  - the location and layout of new developments minimise the need for travel and can be served by high quality public transport, cycling and walking facilities;
  - developers promote sustainable travel for all journeys associated with new development, especially those to work and education, and;
  - the traffic from new development can be accommodated safely and efficiently on the transport network.

- **Objective 2:** Reduce Congestion
- **Objective 4:** Improve accessibility to work, education and services
- **Objective 5:** Secure infrastructure and services to support development

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- **Objective 6:** Reduce carbon emissions from transport
- **Objective 7:** Imrpove air quality, reduce other environmental impacts and enhance the street environment
- **Objective 8:** To develop and increase the use of high quality, welcoming public transport

Objective 9: Develop and increase cycling and walking for local journeys, recreation and health.

A.156 There are also numerous specific references to Transport Assessments and Travel Plans within the body of LTP3. For example, paragraph 8.4 states that "To ensure that new developments meet our requirements we normally expect the following documents to accompany a planning application:

- A Transport Assessment, prepared by the applicant, to set out the transport issues relating to a proposed development. It identifies what measures will be taken to deal with the anticipated transport impacts of a proposed development and improve accessibility and safety for all modes of travel – particularly for walking, cycling and public transport. The assessment will be used to determine whether the impact of the development is acceptable.
- Larger development will be required to prepare a Travel Plan to promote sustainable travel.
- For smaller developments, or those with lesser impact, a simpler Transport Statement and Travel Plan Statement will suffice.

We will set out the threshold values for developers to produce a transport statement, transport assessment, travel plan or travel plan statement and also describe the process and full requirements".

A.157 Transport for New Developments: Transport Assessments and Travel Plans also closely aligns with the aims expressed in Oxfordshire County Council's Sustainable Community Strategy: Oxfordshire 2030: World Class Economy, Healthy and Thriving Communities, Environment and Climate Change, and Efficient Public Services. The document will promote the economy of Oxfordshire through facilitating new development in the County in a sustainable way. It will do this whilst ensuring that new developments provide for the communities which they serve and encouraging healthy lifestyles, and taking the environmental impacts of the development into account. Futhermore, through engaging the private sector to assist in delivering transport objectives via travel plans we will provide customers with value for money and a more efficient service.

Local Development Frameworks

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A.158 Each of Oxfordshire's district councils' Local Development Frameworks contains transport policies relating to travel plan requirements..

A.159 Oxford City Council Core Strategy policy CS13 requires all qualifying developments to produce a travel plan before occupation of the the development.

A.160 South Oxfordshire District Council policy T3 requires transport assessments including, where appropriate, travel plans to be prepared and implemented as part of the planning application process.

A.161 West Oxfordshire District Council 2011 draft Core Strategy policy CP24 requires that in accordance with County Council requirements, travel plans will be required for development proposals that have the potential to attract significant numbers of traffic movements.

A.162 Cherwell District Council Local Plan 2006 – 2031 policy ESD13 requires a transport assessment and travel plan to ensure the site is accessible by sustainable modes of transport and the traffic impact of the development is minimised.

A.163 The Vale of White Horse Local Plan (2011 to 2016) policy DC5 requires that clarification should be sought from the County Council on any possible requirements for transport assessments, travel plans and contributions to on-site and off-site highways improvements which may arise, particularly in association with development proposals that generate significant demand for travel.

Air quality action plans

A.164 There are a number of areas within Oxfordshire where exceedances of Oxides of Nitrogen occur due to pollution from transport. These exceedances tend to be concentrated over very small areas but are nonetheless of concern because of their potential impact on respiratory health. The relevant district councils have declared Air Quality Management Areas and have a duty to develop Air Quality Action Plans (AQAPs) to improve air quality. Travel Plans can assist in reducing emissions, and feature in some AQAPs.

A.165 The Oxford City AQAP (2013) includes a commitement to 'Seek to ensure that stretching targets are set within travel plans for new developments, and that all new developments are encouraged to adopt Delivery and Servicing Plans to reduce freight movements.'

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A.166 The 2009 South Oxfordshire Distrct councils AQAP requires developments surounding AQMAs to produce a travel plan and encourages busness and schools in the AQMA to produce volantary travel plans.

A.167

Appendix 15: Contact Details

For advice regarding Transport Assessments and Travel Plans please contact:

Transport Development Control
Oxfordshire County Council
Environment & Economy
Speedwell House
Speedwell Street
Oxford, OX1 1NE

Tel: 01865 815090
E-mail: transport.development.
control@oxfordshire.gov.uk

Further information can also be found at www.oxfordshire.gov.uk