

**Cheltenham Borough Council
Corporate Travel Plan**

draft Project Initiation Document

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PROJECT INITIATION DOCUMENT

1. Introduction

This project has been established to provide a framework for the development and implementation of a travel plan for Cheltenham Borough Council.

A phased approach is proposed, with policies and measures introduced incrementally over a few years, commencing in Summer 2002. This gradual process should assist with staff consultation and ownership of the travel plan, enabling a comprehensive package of sustainable travel policies and measures to be introduced and refined.

To be effective the travel plan must be an organic process that develops and changes over time. As a significant long-term undertaking its progress will be dependent upon the continued support of senior management for resources and by way of leadership. The council will also need to be open to changes in its day to day operations as it develops its own culture of mobility management.

2. Background

In 1998 the Board of Directors approved a report recommending that a travel plan for the Council be prepared in consultation with employees and unions to encourage staff to use more sustainable modes of transport. The main focus of the plan being initially to develop low to medium cost measures to encourage more frequent use of more sustainable modes of transport.

Since then the council has launched the Cheltenham Travel Plan Group, to encourage the development of travel plans by major local employers and to identify partnership opportunities. A staff survey, in June 2000, produced a baseline for staff travel habits and attitudes from which it has been possible to identify barriers to sustainable travel and those elements of a travel plan most likely to be supported.

Between October 2000 and February 2001 some 720 public car parking spaces were removed from the town centre, largely due to the closure of Jessop Avenue car park for the Waitrose development. This served to highlight the significant level of car parking in the town centre used by council staff. Staff with permits for Jessop Avenue were instead allowed to use North Place car park, giving rise to concerns about the reduced capacity available to shoppers and visitors, particularly at busy periods.

When Waitrose opens in Autumn 2002 it will not provide long stay spaces, so council staff will continue to use North Place car park.

In January 2001 the Board of Directors approved the following elements of the project's decision-making framework:

- **Project Sponsor** – Director of Environmental Services;
- **Project Steering Group** – Board of Directors and Travel Plan Co-ordinator, with representatives from trade unions, public transport operators and Working Groups to be invited to attend meetings as required;
- **Project Working Group** – a representative from each directorate, to work with the Travel Plan Co-ordinator on consultation, development and implementation of the Travel Plan;
- **Travel Plan Co-ordinator** – Transport Strategy Manager, Project Nexus, tasked with co-ordinating the implementation of the plan.

In February 2001 a brain storming session by Board clarified the key objectives, principles and time scale for the travel plan. It also considered the implications of a range of policy changes and measures to encourage staff to use more sustainable transport and to reduce unnecessary travel.

A draft corporate travel plan PID was taken to Board in July 2001 and a decision was made to seek the views of elected members. After the introduction of a new political structure in October 2001 the Cabinet made initial comments on a preferred approach in November 2001.

The draft PID was subsequently revised and a draft set of travel plan measures was proposed, this forming the basis of a £15,000 revenue bid for 2002/2003. The draft PID and draft travel plan measures were then considered by Project Nexus Steering Group on 22nd November 2001 and by the Working Group, briefly, at its first meeting on 3rd December 2001.

According to the draft budget for 2002/2003, published in early December 2001, the revenue bid will not be funded. The Cabinet has expressed concerns as to the timing of this scheme. With the reorganisation of the officer structure due in 2002 the Cabinet is concerned that staff morale does not suffer from additional changes and uncertainties. Consequently it has concluded that it would be inappropriate to investigate a more assertive travel plan package until the new officer structure is bedded in.

The Travel Plan Coordinator and Working Group will therefore focus, for the foreseeable future, on the development and implementation of policies and measures which are likely to receive staff support and incur minimal, if any, cost to the council. These could start being introduced in summer 2002.

3. Terms of Reference

3.1 Objectives

To implement a package of measures to encourage and support more sustainable commuting by staff and to provide council services in ways which promote sustainable travel and minimise unnecessary travel. These will contribute towards the following wider objectives:

- introducing a more equitable system for managing access to council sites and services;

- reducing unnecessary travel (especially single occupancy car travel) which contributes to local congestion and pollution, especially at busy times of day;
- improving the council's image amongst local people and businesses by adopting policies consistent with those which it advocates as local planning authority and agent for the highway authority;
- supporting the council's environmental management strategy and climate change strategy to reduce CO₂ emissions due to council business;
- providing best value in the delivery of council services;
- supporting and enhancing the council's ability to recruit and retain staff;
- reducing staff demand for long stay public car parking spaces in the town centre;
- giving the council more flexibility over the potential uses of land within its ownership and control.

3.2 Project Scope

The Project has been set up to enable the council to develop and implement policies and measures necessary to achieve the objectives set out above within appropriate time scales. The travel plan will require an ongoing commitment, involving regular monitoring and review of objectives, policies, and measures to ensure that it evolves and remains focused.

Initially the focus of the travel plan will be on the Municipal Offices however it is intended that it will ultimately apply to the whole council. It will recognise the diversity of services provided at several sites by tailoring measures to suit specific operational constraints. A priority assessment process will determine the order in which sites outside the town centre are considered.

Government guidance on the implementation of travel plans and examples of best practice will form the basis of the approach taken by the council. To maximise the effectiveness of its travel plan the council will work with members of the Cheltenham Travel Plan Group, the County Council and other authorities, to benefit from the pooling of resources.

3.3 Project Key Principles

The following overarching principles will apply to the process of developing and implementing the travel plan:

- it will be developed in consultation with staff and unions;
- it will complement and be complemented by other council policies;
- it will review the commuting and business travel of all staff working at council sites included within the travel plan.
- incentive-led measures will precede those based on disincentives – disincentives will be based on the alternatives being fully in place;

- changes to existing working methods will be fully explored where these demonstrate potential to meet the objectives of the travel plan.
- savings achieved by the travel plan will be ring-fenced for reinvestment in further development of the travel plan;

3.4 Project Costs and Resources

A common feature of successful travel plans is recognition of the need to take a long term perspective; by incurring costs in the short term, longer term savings can be realised.

By promoting home working and encouraging alternatives to single person car commuting a travel plan could reduce the office accommodation and car parking requirements of the council. Encouraging more walking and cycling has also been shown to benefit employees' health and reduce stress levels, leading to lower levels of absenteeism and sickness at the workplace.

Looking further ahead, the disposal of land used by staff for car parking would be more feasible and easier to manage with a voluntary travel plan in place. In the event of the council deciding to relocate from the Municipal Offices a travel plan would most probably be required as a planning obligation, so having one in place would be advantageous in many respects.

For staff, travel plans can bring savings in the form of lower commuting costs, which in some cases may involve no longer requiring to own a car specifically for commuting or business use. Publicising these savings, and other health benefits, is a key element in the promotion of a travel plan to staff.

From this it can be seen that as cross-cutting packages of measures travel plans can result in savings across a range of council budgets. The costs of implementing a travel plan should be weighed against these and should not be considered in isolation.

However, a key principle, adopted by many established travel plans, is the ring fencing of savings for a fixed duration to fund travel plan incentives and measures. This mechanism helps with staff ownership of a travel plan by demonstrating that cost cutting is not the sole objective. It can also help build staff support for measures introduced later in the travel plan, where these might otherwise be less popular.

Whilst the costs of specific 'hard' measures, such as cycle parking and information boards, are relatively straightforward to quantify, it is a feature of travel plans that exact costs are difficult to predict. These are largely dependent on employee take up of softer measures, such as car sharing initiatives, teleworking and loans for public transport season tickets.

A clearer indication of likely take up and costs can only be established following the staff survey and consultation.

At the time of writing no revenue funding is proposed for the corporate travel plan in 2002/2003. As this postpones travel plan measures which require significant publicity, subsidy or capital works it is proposed that a range of minimal cost measures will be explored with the staff Working Group, for implementation during this period.

The time scale for introducing more significant travel plan measures depends upon the results of the Working Group's investigations and the level of funding allocated in future years. The effectiveness of a travel plan tends to be closely related to the level of investment made – evidence from established travel plans suggests that until more significant incentives are funded there is unlikely to be a measurable modal shift away from single occupancy car commuting.

To achieve a measurable modal shift a travel plan would probably require a budget of approximately £15,000 per year.

The development and implementation of a corporate travel plan is one of the responsibilities of the Transport Strategy Manager in Project Nexus. Managing a travel plan can be very resource intensive so the level of funding will have implications on the time which the Transport Strategy Manager can devote to other work areas. However the management of a modestly funded travel plan is not expected to result in operational difficulties.

3.5 Project Constraints

The following factors will constrain the development of the travel plan and its ability to meet the objectives:

- a short term approach;
- lack of senior management support giving rise to perceptions of unequal treatment of staff;
- lack of staff ownership of the travel plan;
- insufficient time resources to manage and co-ordinate the travel plan;
- insufficient financial resources for sustained marketing and funding of the travel plan and especially incentives to encourage sustainable travel;
- the open ended provision of subsidised annual car parking permits available to many staff working in the town centre. The inflexibility of this system gives staff no incentive to use more sustainable travel modes on an occasional or regular basis;
- lack of sufficiently attractive incentives to balance measures regarded by staff as making it more unpleasant, time consuming, costly or dangerous for them to get to work or carry out their job;
- perceived and real problems with the reliability of public transport services;
- difficulty accessing public transport timetable information and car share information;
- perceptions about the safety of cycling on the public highway;
- jobs which require travel to work late at night and early in the morning when there are fewer alternatives to the car and fear of crime is greatest;
- personal circumstances making it difficult to use other modes of transport, eg child care, health, disability;

- legal constraints limiting the council's ability to change terms and conditions in staff contracts of employment where these do not encourage sustainable travel behaviour;
- difficulties retaining existing staff and recruiting new staff;
- high local house prices, forcing more staff to live further from work, and relocation terms which do not encourage new staff to live locally.

3.6 Timescales

A phased approach is proposed for the introduction of travel plan policies and measures. This should assist with staff consultation and ownership, enabling a comprehensive package of sustainable travel policies and measures to be implemented.

Many of the elements of a travel plan have already been investigated, including, for example, the collection of baseline quantitative information on mileage claims and car parking use. Qualitative information has also been collected, regarding staff attitudes, perceived barriers to take up and incentives which are likely to be supported.

Although a staff survey was undertaken in June 2000 another survey in early 2002 is suggested to provide up to date baseline data needed to inform the development of travel plan. The Working Group has suggested that this be made compulsory, for a more accurate picture of staff travel behaviour and attitudes. Policy changes and incentives can then be targeted more effectively.

Phase One of the travel plan will be launched in June 2002 with a series of minimal cost measures. Initial measures should be practical, show results in the short term and be identified as potential winners in the staff survey. These will be complemented later by further measures and policy changes, on a timetable largely determined by available resources. All measures and policy changes will be subject to consultation with the Working Group and unions.

Phase Two would start when more funding becomes available. A key objective would be to provide staff with more substantial incentives and access to more information, to maximise uptake of sustainable travel modes. It is suggested that this phase includes a detailed review of operational practices and policies, particularly those dealing with car parking and use.

Phase Three would build on the incentives put in place during the first two phases, introducing demand management measures aimed mostly at reducing single occupancy car commuting. Best practice suggests that measures to discourage single occupancy car commuting, such as parking charges, should not be introduced until reasonable alternatives are in place.

Evidence from established travel plans shows that this phase offers the potential to achieve a 10-15% modal shift change away from single occupancy car commuting, as well as other benefits in terms of health, employee stress and productivity. Travel plans which solely comprise the incentives tend not to achieve more than a 5% modal shift.

The timing of the travel plan's second and third phases depends largely on the availability of significant funding, as well as political, personnel and wider considerations. However timing should also take account of the need to maintain the travel plan's momentum and reflect progress which has been made on the ground.

3.7 Project Plan

See Appendix 1.

3.8 Project 'deliverables' or 'products'

Review and planning is necessary to develop and refine proposals so that the travel plan meets the objectives. If a significant modal shift of 10% or more is achieved the travel plan could be cost neutral in the long term. However this would require the adoption of the demand management tools associated with the third phase of the travel plan.

Some of the issues which fall within the remit of a travel plan have the potential to cause significant levels of concern and anxiety amongst staff. It is therefore important to ensure that staff have ownership of the travel plan and are likely to use the incentives to change their travel habits.

To help achieve this there will be ongoing consultation with staff and unions through the Working Group and modal sub groups. Staff awareness of the travel plan, enhanced by the staff survey and launch publicity, will be maintained by drip feeding information to staff using the council's intranet and *News*.

To ensure that the travel plan remains focused the objectives and targets the Steering Group will hold an annual review to consider:

- overall progress, based upon the results of monitoring and qualitative feedback from the Working and modal groups;
- decisions on future development of the travel plan, including corrective actions;

4 Package of Measures

A successful travel plan incorporates those transport alternatives which staff and visitors will be prepared to use. Where these are made more attractive than driving alone there is the greatest potential to change travel behaviour.

There is no single solution to the council's transport needs and problems – the council employs people in a wide range of jobs at several sites, with different personal circumstances. A package of measures is required to let people select those which are most suitable for their lifestyles.

An initial package of travel plan measures, outlined in the Project Plan, is being developed with the Working Group. Measures arising from Working Group meetings will then be subject to consultation with unions. However these are likely to evolve pending the results of the staff travel survey in early 2002, the preferences expressed by Cabinet, decisions made by the Project Board, and consultation with staff, unions and transport providers.

Experience of travel plans in other organisations suggests :

- putting carrots before sticks, to build early support for the plan and to encourage changes to travel behaviour;
- choosing popular measures first, recognising budgetary constraints;
- including quick win measures for an immediate effect, boosting confidence;
- publicising success in terms of achieving targets and objectives - staff are more likely to change their behaviour if they see others doing so already;
- recognising the role of measures which reduce the need to travel;
- remembering that we are not asking people to give up using cars forever or for every journey - leaving the car at home once a fortnight equates to a 10% reduction in car commuting.

5 Roles & Responsibilities

5.1 Executive Committee

Major decisions on the Corporate Travel Plan and PID are the responsibility of the Cabinet, which will also provide a strategic steer.

5.2 The Sponsor

The Director of Environmental Services, as Sponsor, has full authority for the project and together with the Steering Group (Project Board) will provide overall direction and final authorisation of the budget. The Sponsor will make arrangements to keep the Cabinet and/or other Members informed of progress and will chair Steering Group meetings. The Sponsor is final arbitrator if the Steering Group disagree or cannot come to a consensus decision.

5.3 The Project Board (to be known as the Steering Group)

This consists of:

- A member of the Cabinet – currently the Leader of the Council
- The Project Sponsor – Cliff Ride
- Travel Plan Co-ordinator – Philip Williams
- Board of Directors

with representatives invited as appropriate from:

- trade unions

- public transport operators
- the staff Working Group

The Steering Group's responsibilities include:

- taking 'executive' responsibility for the success of the project
- co-ordinating priorities
- approving plans which deviate from the agreed overall project plan
- providing top level decision making and problem resolution

5.4 The Project Co-ordinator

The Transport Strategy Manager will be co-ordinating the Project, with assistance from Project Nexus. His main responsibilities will include:

- drawing up an achievable project plan and managing the progress of the Project against the plan;
- taking responsibility for quality and performance, particularly in terms of meeting objectives, timescales, budget and sponsor satisfaction;
- reporting formally to the Steering Group, Sponsor and other bodies as requested;
- helping specify and agree any changes or modifications to the project plan;
- ensuring that safety standards are maintained throughout the project;
- conforming to agreed tolerance and escalation levels and contributing to risk assessment, and
- monitoring authorising expenditure against the budget.

6. Project Plan

The overall Project Plan is the responsibility of the Project Co-ordinator once agreed by the Executive Committee. The following elements will be shown on the project plan:

- **Milestones:** major decision or completion points
- **Activities or main tasks:** main areas of work
- **Timescales & deadlines:** start dates, finish dates and lapsed time
- **Products:** to be delivered at the end of each milestone or stage
- **Resources needed:** including person days required

7. Reporting & Control Mechanisms

The Project requires control mechanisms. This section briefly describes these.

7.1 Reporting Controls - Steering Group

The Project Co-ordinator will report to the Steering Group at initially 1-2 monthly Project Board meetings. This meeting will also be a forum for discussing overall project progress. The Steering Group agenda may include:

- an analysis of known and predicted problems plus contingency plans and corrective action
- the preparation of reports to the Project Sponsor and/or Members
- decisions on future or corrective actions

7.2 Project Management Controls

The Project Co-ordinator will have regular review meetings with the Project Sponsor for discussion on progress to date. The discussion should include resource usage, time scales, problems/contingencies and corrective action.

8. Tolerance Levels & Escalation Procedures

The following Tolerance Levels are agreed:-

The Project Co-ordinator should notify the Steering Group in the following circumstances :

- Likely non-delivery of any element within the project and relevant corrective actions
- Budget limits being exceeded
- Risks foreseen and proposed contingencies/solutions

8.1 Escalation Procedures

There are 5 levels of Problem Escalation. When problems occur they should be handled by the first level of escalation. If the person at this level cannot find a suitable resolution (within the tolerance levels described above) the problem must be escalated to the second level and so on, with "ownership" for the resolution of that problem also passing upwards.

Escalation levels are as follows:

Level 1	Project Co-ordinator
Level 2	Project Sponsor
Level 3	Project Board / Steering Group
Level 4	Cabinet

If any significant changes are required to the original Plan then the Project Sponsor should be consulted.

9. Risk Identification

The following risks and contingency plans/corrective action have been identified:

RISK	CONTINGENCY or CORRECTIVE ACTION
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Too much staff time needed to coordinate the travel plan.	Clear agreement needed on staff input before project starts.
Staff complaints about the way the travel plan is implemented.	Swift response and remedial action needed for all complaints.
Lack of senior management support and lack of ownership by staff.	Consult staff and allocate sufficient resources to marketing
Insufficient funds to support a long term approach	Review objectives, targets and project plan in line with budget allocation;
Incentives not sufficiently attractive to produce expected modal shift by staff.	Review results of staff survey, operational constraints and funding.
Sustainable travel alternatives not as attractive as car parking permit system	<ul style="list-style-type: none"> • Review incentives for alternative travel modes and funding available. • Review car parking permit system.
Negative perceptions of public transport, walking and cycling hindering modal shift by staff	<ul style="list-style-type: none"> • Improve marketing of alternatives. • Work with service providers to improve quality of provision. • Provide incentives which address personal safety concerns.
Insufficient public transport information available to staff.	<ul style="list-style-type: none"> • Make more use of intranet, internet and notice boards at council offices.
Difficulties recruiting and retaining staff. New staff unable to live in Cheltenham may be more dependent upon car use to get to work.	<ul style="list-style-type: none"> • Compare with other authorities. • Consult Working Group to understand staff concerns and to explore solutions. • Review relocation package policy and how it could mitigate against high house prices locally.
Legal constraints prevent changes to new contracts or working practices.	<ul style="list-style-type: none"> • Obtain legal advice early on. • Consult with other authorities.
Criticism of council travel practice by local organisations.	Accelerate plan implementation if possible.

10. Administration Issues

The Travel Plan Co-ordinator will hold the Project Master File. This will contain the Project Plan and other relevant information.

PROJECT PLAN

MAIN TASKS	TIMESCALE	RESOURCES NEEDED
PID taken to Cabinet	Jan 2002	
Consultation	Jan 2002 onwards	Staff time: mostly Travel Plan Coordinator and Working Group Ongoing involvement of unions and staff in development of policies and measures.
Staff travel survey Analyse survey, draw up targets and publicise results.	Feb 2002 April 2002	Staff time - Travel Plan Coordinator, Working Group
Corporate Travel Plan (Phase One) taken to Cabinet	May 2002	
Phase One Launch initial elements of travel plan: Minimal cost measures mostly focused on staff working in the town centre. Accessibility audit of council sites, to consider car parking, cycle facilities and public transport links. Monitoring and analysis of take-up, using annual staff travel survey. Initial and ongoing publicity	June 2002 onwards June 2002 onwards	Staff time and administration costs. Existing budget of £1500 available for: <ul style="list-style-type: none"> • marketing & publicity; • minor works; • sustainable travel incentives; • ICT : enabling use of intranet and internet for public transport journey planning.
Phase Two - subject to funding More costly incentives and car parking review. Extend initial measures to sites outside town centre, as appropriate. Monitoring and analysis of take-up, using annual staff travel survey. Increased level of publicity	to be decided	Staff time and administration costs. Generally medium cost measures requiring a budget for: <ul style="list-style-type: none"> • marketing and publicity; • more significant sustainable travel incentives; • building works e.g. cycle parking, information boards; • monitoring.
Phase Three - subject to funding	to be decided	

MAIN TASKS	TIMESCALE	RESOURCES NEEDED
<p>Refining package of measures for town centre sites.</p> <p>Extending measures to council sites outside the town centre.</p> <p>Introduce demand management measures if appropriate. eg car parking charges</p> <p>Monitoring and analysis of take-up, using annual staff travel survey.</p> <p>Higher level of publicity</p>		<p>Staff time and administration costs.</p> <p>Measures as in phases 1 & 2 but ring fencing savings from:</p> <ul style="list-style-type: none"> • reduced mileage claims; • income from introduction of staff car parking charges; <p>to pay for:</p> <ul style="list-style-type: none"> • more attractive sustainable travel incentives; • more significant building works; • ICT resources - possibly purchase of an intranet and internet compatible car share database.