

Developing an effective travel plan

Advice for Government departments



are you doing **your bit?**

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Advice for Government departments



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GUIDE TO GOVERNMENT DEPARTMENTS ON TRAVEL PLANS

Foreword

Travel plans help reduce the impact of travel on the environment. They also make good business sense. Plans can cut congestion around a site, and save money on business travel. They may even help make the workforce healthier.

Plans can take a variety of forms to suit the particular site. But they all tend to include practical measures to reduce:

- car travel to work;
- car travel for business;
- the need for business travel; and
- the environmental impact of cars, lorries and vans when they have to be used.

We are encouraging businesses, schools, hospitals, local authorities and other major employers to adopt travel plans of their own. So the Government needs to show we are practising what we preach.

The White Paper *A New Deal for Transport* set a target for Government departments to have plans in place for all their headquarters buildings by March 1999, and for all other key buildings by March 2000. I am very pleased with progress so far and would like to thank all of those who have put in time and effort ensuring that we 'do our bit'.

But producing plans is by no means the end of the process. Independent evaluation of the many plans produced to meet the March 1999 target highlights both successes and lessons to be learnt. We can now build on experience to improve existing plans and to develop effective new ones. To be successful, they need to be monitored and reviewed regularly.

This is a guide to best practice, which draws on the evaluation and the hard work departments have put in over the past year. It offers practical advice and ideas on how to approach issues and how to overcome problems. We hope real-life examples will make the task a little easier and the results more effective, both for departments' co-ordinators and for other organisations who face similar issues, particularly those in the public sector.

If we can cut the congestion and pollution caused by too heavy a reliance on road transport, both the economy and the environment will benefit. Work travel is one of our most regular travel patterns, so changes here could have a really significant effect. It is for Government to give the lead and I hope this guide will help us to do so.



KEITH HILL

SECTION ONE

Travel Plans: The Background

1.1 What is a travel plan?

1.1.1 A travel plan (formerly known as green transport plan) is a management tool designed to minimise the negative impact of travel and transport on the environment. The travel plan aims, through a set of mechanisms, targets and initiatives, to incorporate transport and other issues in a co-ordinated strategy that also benefits Government departments and their staff.

1.1.2 A successful plan is not a one-off event: it is dynamic and will develop and evolve with the changing circumstances of your department and its environment. It is the start of a new, better way of living and working.

1.1.3 Your travel plan must be tailored to the specific circumstances of your site. It should take into account factors such as the size and location of the department or building; the staff-size; the number of visitors; and the number of deliveries or contractors servicing the building. Where more than one department occupies a building, you could join forces to produce a travel plan that will benefit you all. Similarly, where departments occupy neighbouring buildings it is worth looking at the scope for a joint plan.

1.1.4 Some or all of the following forms of travel and transport may be considered in a travel plan:

- journeys by staff to and from work;
- business travel;
- travel by visitors;
- deliveries and contractors; and
- fleet vehicles.

1.2 Using this guide

1.2.1 This guide has been developed following a detailed evaluation of the plans produced for headquarters buildings and main buildings occupied by executive agencies and government offices for the regions by March 1999. It offers step-by-step advice and examples of good practice for departments to create effective travel plans for their buildings.

1.2.2 The Energy Technology Support Unit's (ETSU) travel plan resource pack for employers contains further useful information. The resource pack is available from the Government's Environment and Energy Helpline. (Tel: 0800 585794).

1.3 Why have a travel plan?

Government Requirement

The Kyoto climate change conference in December 1997 provided the UK with a legally binding target to reduce greenhouse gas emissions to 12.5% below 1990 levels by the period 2008-2012.

In the UK, emissions of CO₂ from road transport are the fastest growing contributor to global warming.

The CBI has put the cost to the British economy of traffic congestion and unreliable journey times at around £15 billion every year.

Although we have fewer cars per person in Britain than in most other EU countries, each car averages more mileage and we make less use of public transport

1.3.1 Building more new roads will not solve the problem of traffic congestion. The previous government put tackling traffic growth at the centre of its national debate on transport, which culminated in the 1997 Green Paper *Transport: the Way Forward*. The Royal Commission on Environmental Pollution's report, also in 1997, raised concerns that traditional transport policies would prove environmentally, economically and socially unacceptable.

1.3.2 The present Government recognised the need for a radical change in travel in its White Paper *A New Deal for Transport: Better for Everyone* in 1998. It recommends less use of private cars, particularly for single occupancy trips, and encourages more use of public transport, walking, cycling and car sharing.

1.3.3 The Government is keen to lead by example and set a target in the White Paper that all key buildings occupied by Government departments, government offices for the regions and executive agencies should have travel plans, in place by March 2000. Most Departments' headquarters buildings and main buildings occupied by executive agencies and government offices for the regions already have plans, in line with the White Paper commitment that they should be in place by March 1999.

1.3.4 Key buildings are defined as those where the department has more than 50 staff and is the primary civil service occupier. We would encourage the departments who are minor occupiers in these buildings to work together with the major occupier to ensure that the travel plan covers their staff too.

1.3.5 The development of travel plans is also an important part of the wider Greening Government initiative aims to reduce the environmental impact of government operations. Departments are required to report on progress through the government's designated Green Ministers who meet on a regular basis.

THE BENEFITS OF A TRAVEL PLAN

1.3.6 A travel plan benefits the department, the staff, the local community and the environment. You need to promote these benefits in order to

secure the commitment of your senior management and staff.

1.3.7 A travel plan can bring a number of clear benefits.

- Staff will enjoy improved health, saving costs and time; less stress; and a better quality of life, with greater choice of travel.
- The department will gain from increased productivity from a healthier, more motivated workforce; possible cost savings; reduced demand for car parking, with less congestion and better access for employees, visitors and deliveries; and a step towards ISO 14001/EMAS accreditation.
- The local community will appreciate the reduced traffic congestion, shorter journey times, and better public transport services; they will also appreciate less parking by non-residents in residential areas.
- The environment benefits from improved air quality, less noise and dirt, and a reduced impact of wider environmental problems such as global warming.

ENVIRONMENTAL MANAGEMENT SYSTEMS

1.3.8 You can link a travel plan to one of the environmental management systems for accreditation. ISO 14001 and EMAS are the main systems in use in the UK.

1.3.9 An EMS controls the environmental performance of an organisation. The system introduces a rolling programme of review; devises measures to meet objectives; and assists with implementation, monitoring and modification.

1.3.10 ISO 14001 is a world-wide standard, open to all sectors. EMAS, a European standard, is restricted to the industrial sector and local authorities. It is a more stringent system than ISO 14001, as it requires registration and verification by an external assessor. The two systems will probably be integrated from early 2000.

1.3.11 The Energy Efficiency Accreditation Scheme, as administered by the Institute of Energy, also includes an assessment of an organisations travel plan and associated energy efficiency implications.

HM Customs and Excise have achieved ISO 14001 certification of their London Central sites. This reflects the department's commitment to the continuous improvement of its environmental performance. They have linked their travel plan into the certification scheme.

The Inland Revenue National Insurance Contributions Office was awarded an "Accreditation for Achievements in Energy Management" by the Institute of Energy in November 1999.

1.3.12 The Government accepted the Environmental Audit Committee's recommendation that all departments should have begun introducing an EMS by the end of Parliament, with a view to extending them across their estates, where cost effective. It is also sympathetic to the Committee's recommendation for 75% of its departments to gain ISO 14001 certification for at least one of their sites by 2001. Certification can:

- help to secure resources;
- increase your plan's credibility;
- ensure continued staff involvement;
- achieve recognition for the travel plan co-ordinator; and
- demonstrate your commitment to the environment.

1.4 What a travel plan document should include

1.4.1 You should identify your target audience for a travel plan. Is the document for all staff or is it a working document? It may be appropriate to have separate documents – one with the information for a day-to-day working document, and the other a marketing document for staff. An executive summary is useful for selling the travel plan to management, staff and other organisations.

1.4.2 A list of contents at the beginning of the travel plan makes it easily understood. Page

numbering is also useful. There should be clearly defined sections that cover:

- background information on your department's site, including its location, staff numbers and current travel patterns;
- objectives within the travel plan;
- scope – which elements of travel you are addressing;
- proposed actions and measures for achieving the objectives;
- marketing proposals for the travel plan;
- targets that determine whether you are meeting the objectives;
- how the travel plan will be monitored and reviewed, and by whom; and
- how the results of the monitoring exercise will be disseminated to all members of staff.

1.4.3 For large departments it may also be appropriate to produce a third over-arching document to cover corporate policy such as T&S and fleet management. This would then be applicable to all the departments' buildings.

No two travel plans are identical, but a 'good' travel plan will:

- have senior management support;
- be based on current travel patterns;
- have clear objectives;
- include a package of measures (carrots and sticks);
- have staff time allocated, with an appointed co-ordinator;
- involve all staff;
- include extensive marketing of the plan itself and its component measures;
- set clear targets with specific dates; and
- establish monitoring procedures.

SECTION TWO

Roles and Responsibilities

2.1 Senior management support and commitment

2.1.1 A successful travel plan needs commitment from senior management as well as other staff members. It is important that a senior member of the department makes this support clear at the start, ideally with a commitment to examine his or her own travel habits.

“I, for my part, will be looking closely at my own travel arrangements and I am asking my Management Board colleagues to do the same. All staff are encouraged to enter fully into the spirit of green travel so that we can be seen to be making a valuable contribution to Green Travel within the Government. If we can all modify our travel habits, even slightly, we can start to make a difference.”

Chief Executive
Highways Agency

The Regional Director of the Government Office for the East Midlands reviews progress on their travel plan at quarterly meetings with team leaders and the GO-EM Management Board.

2.1.2 It may prove easier to get the commitment of senior management if you first develop a business case for the travel plan. Senior management may view the plan more favourably when they understand the financial, social and political benefits.

2.1.3 The business case should specify the financial benefits of the plan. It should also indicate the costs of preparing and implementing

the plan. The ultimate savings may be spread across several sections in the department and their overall impact may not be easily seen.

2.1.4 Section Eight of this document illustrates the main financial costs and benefits of a typical travel plan. The lists are not exhaustive and will vary for different departments and sites. There is further guidance in DETR’s *The Benefits of Green Transport Plans*, and in the ETSU *Travel plan resource pack for employees*.

2.2 The travel plan co-ordinator

2.2.1 The co-ordinator is the key to a successful travel plan, regardless of whether the appointment is at a central or local level, full or part-time and irrespective of the level of the appointment. The co-ordinator needs enthusiasm, negotiating skills and an ability to communicate with people at all levels. He/she must have authority to be the promoter of the cause, but cannot be expected to do everything alone.

2.2.2 The co-ordinator’s responsibilities include:

- getting commitment and support from senior managers, other employees and union representatives;
- promoting the objectives and benefits of the travel plan;
- acting as the point of contact for information and for exchanging ideas and best practice with other organisations; and

- liaising with others, including local authorities and transport operators, to get a wider choice of travel for all staff.

2.2.3 Although the nature of the position will vary, the co-ordinator needs to become the driving force behind the plan. The post will only be full-time in a large department so it is important to set time aside for the task. Setting up a travel plan takes the most time but once it is up and running the co-ordinator still needs allocated time to maintain the momentum.

2.2.4 The role of the co-ordinator is demanding, and he/she will need help. The ETSU resource pack provides details of several sources of help.

2.3 Steering group

2.3.1 The role of a travel plan co-ordinator can be an onerous task for one person. You can help by setting up a steering group to provide direction for the co-ordinator.

In the Government Office for the West Midlands, the steering group considers the overview of the travel plan and any difficulties that arise, offering advice when appropriate.

2.3.2 Generally, a steering group would not have more than about eight people, including:

- one representative from each main section in the department;
- the director or a senior manager;
- the travel plan co-ordinator; and possibly
- someone from outside the department to give an 'outsider's' view.

2.3.3 There is a balance between the size of a steering group and its effectiveness. People involved in schemes such as car sharing or a bicycle user group could be present but only contribute to the discussion when relevant.

2.3.4 The steering group should liaise with the co-ordinator and the department on when it meets, where it meets and how often. These

details need to be settled at the outset. The group's meetings should take priority and by standardising the time and place of the meetings you will contribute towards the group's success.

2.4 Staff consultation

2.4.1 It is crucial to involve all your staff from the beginning. Take every opportunity to involve them in your plans, targets, events and results, as this promotes a feeling of ownership of the travel plan. The more staff are involved, the more likely they are to change their travel behaviour and give the plan ongoing support.

2.4.2 There are many ways of letting your staff know what is going on, including intranet, posters, leaflets, newsletters and meetings. Adding the travel plan to standard staff meetings is a valuable move. Attendance at meetings is always greater when at least part of the meeting takes place within normal working hours.

2.4.3 You may find it useful to set up a consultation group. Its views do not have to be accepted automatically or without moderation. Again the size of the group is important – not too large but including a range of views. This group may provide valuable input into the content and timing of staff surveys.

2.5 Trade union consultation

2.5.1 The involvement of trade union or staff association representatives helps with the smooth running of the travel plan. You would find it valuable to hold informal discussions with them at a very early stage, before going public with the idea of a travel plan.

2.5.2 The purpose of these discussions is not only to make sure that the representatives know what is going on – their enthusiasm could be passed on to the staff – but also to encourage co-operation and avoid confrontation on specific issues such as changes in car parking policy. The union could be represented on the consultation group, or on the steering group in a large department in which significant changes are planned.

2.5.3 Keeping staff and their representatives fully informed reduces the likelihood of anyone feeling threatened by the travel plan and increases the likelihood of support and success.

2.6 Modal user groups

2.6.1 You should encourage people to participate if they are particularly keen to ensure that some of the measures are carried forward. For instance, a car-sharing scheme is more likely to succeed if it is run by people who are eager to be part of it. A bicycle user group can stimulate support for cycling to work. Many cycling enthusiasts are happy to run events such as bicycle maintenance sessions, or to cycle with less experienced members of staff, as buddies, to build up their confidence.

2.7 Promoting partnerships

2.7.1 A travel plan must obviously relate to a specific site. However, it is also clear that partnership with other organisations brings greater benefit than working in isolation. You should consider working with other departments in the same, adjacent and nearby buildings, and with your local authority. Links with the community and local transport operators are also valuable. Local transport plan guidance already requires local authorities to develop partnerships with major employers and public transport operators.

2.7.2 Travel plan co-ordinators will benefit by sharing their experiences with co-ordinators in other Government departments. Pooling resources usually increases effectiveness and strengthens your lobbying power.

2.7.3 In some cases, the travel plan co-ordinator may get support through the department's membership of a local travel awareness scheme, such as Travelwise. When you are considering options for promoting public transport, you should consult with the local transport operators. They might help by providing or re-designing timetable information, or by amending service times and routes. They may even introduce a new service for your employees. Where services are operated on a commercial basis both sides would gain from increasing the number of users.

The Government Office for London has taken a major role in promoting partnerships by setting up a forum for government department co-ordinators in the region.

The Government Office for East Midlands is an active member of the Nottingham Commuter Planners Club, researching examples of best practice in commuter planning to incorporate into its own commuter plan as appropriate.

The Company TravelWise Scheme in Birmingham offers individuals whose employers are committed to producing travel plans, discounts on travelcards through CENTRO (the Passenger Transport Executive), and discounts on cycles and scooters through local companies. The scheme provides further assistance in the design, processing and analysis of staff travel surveys. Government Office for the West Midlands and The Highways Agency are members of the scheme.

SECTION THREE

Understanding Current Travel Patterns

3.1 Understanding the context

3.1.1 Your travel plan is more likely to succeed when it is based on an accurate picture of travel patterns and an understanding of the factors that influence a person's choice of travel. So you will need to carry out:

- a site and facilities assessment;
- a survey of staff travel patterns; and
- audits of other travel related to the department.

3.1.2 You may also need to review some aspects of your department's operation and structure.

- Personnel policy: what are your working practices for new members of staff? Do they include teleworking and working hours? How flexible are these practices? Is there a departmental health policy or environmental policy that relates to transport? Can staff work from home?
- Travel and Subsistence policy: do staff use public transport for business trips and are there privilege rates for trips by bicycle rather than by car? Are there loan schemes for public transport season tickets, and can they be used for buying a bicycle? Does a car's engine size affect mileage payments?
- Parking policy: how many on-site parking spaces are available? Is there any priority according to seniority? Do you encourage staff

to share cars? Are there secure parking facilities for bikes? Are there charges for car parking?

- Fleet management policy: are the vehicles efficient and have the lowest emissions in their class? Are the trips scheduled to minimise the mileage? Are trips linked to avoid wasted mileage? Are vehicles used to collect goods that could be delivered by suppliers more economically? Does the vehicle fleet include bicycles?

Surrey County Council encourages staff to work at home one day per fortnight, thus potentially reducing the number of commuting journeys by up to 10%.

3.2 What facilities are currently available at and around the site?

3.2.1 One of the most likely aims of any travel plan is to encourage people to do without their cars for at least some journeys to work. Up-to-date, reliable information about public transport can make a significant difference to the way people travel.

3.2.2 So first you should establish what services do run nearby, where the stops are and whether there is scope to improve them. This will show where improvements to the services may be needed to encourage people to use them.

3.2.3 On your site, are there changing areas and washing facilities for staff who cycle to work? Are there secure cycle racks and lockers for clothes and

cycling accessories? If not, could you make such facilities available? Unless you accommodate the needs of cyclists, particularly during hot or bad weather, you will not increase the numbers cycling to work. Safe access routes for cyclists and pedestrians are also important.

3.2.4 In the car park, you need to know how the spaces are used, by whom, and whether it is more difficult to find a space at certain times. If there is no on-site parking, then where do people park, and how much does it cost the department?

3.3 What are the current travel patterns?

3.3.1 You need to know how your staff travel, particularly for the commuting journey, for an effective travel plan. Focus groups may be helpful and should include a range of staff representatives that considers their position in the Department, their age, gender, and where they live.

3.3.2 The results of the groups can be fed into the staff survey. This will quantify how and why staff travel to and from work, what would encourage drivers (particularly those who travel alone) to switch to something else, and how you could improve facilities for people who do not use a car.

3.3.3 Questionnaires must be easy to fill in. They should be as short as possible, with simple questions. It is useful to test your questionnaire in a pilot survey of 15-25 people, depending upon the size of your department.

3.3.4 Appendix A contains an example of a basic staff travel survey questionnaire which could be adapted as necessary. There is more detailed guidance on designing and running a staff survey in the ETSU resource pack.

3.3.5 You should conduct the survey according to the size and nature of the Department and its working practices. You can distribute questionnaires by hand or via internal mail systems. Where available, you can use the department's e-mail system.

3.3.6 In your analysis of the survey results you need to know:

- the percentage of people answering each possibility for each question (the 'frequency of response');
- the answers to each question tabulated by a range of factors such as travel mode, age, gender or distance from work; and
- the number of people replying to each question (100% of respondents in favour of a particular measure is less significant if only three or four people, out of a larger workforce, answered the question).

3.3.7 All surveys must be collected, analysed and interpreted within the spirit and principles of the Data Protection Act. People have a right to privacy and must be fully aware of what information is required and why. The information collected may not be used or disclosed for anything other than the purpose for which it is collected. Thus you need to collect only home postcodes, not full postal addresses.

Following its staff survey, the Highways Agency held a number of green travel workshops at their offices to ask staff for their views on travel to work, travel on business and travel avoidance.

3.3.8 You also need to know similar information about business travel by the department's staff. Depending on the scope of your plan, you may need to gather information about visitors to the department, their purpose, mode of transport, and how often they visit. It may be necessary to look at how the department's own vehicles are used.

3.3.9 Collecting so much information at once may delay the travel plan. It may be more effective to concentrate on staff travel first, especially outside London where cars are frequently used for commuting. For departments within London, where public transport accounts for a very high proportion of commuting journeys, it may be better to look first at business travel or deliveries.

SECTION FOUR

Objectives, Targets and Indicators

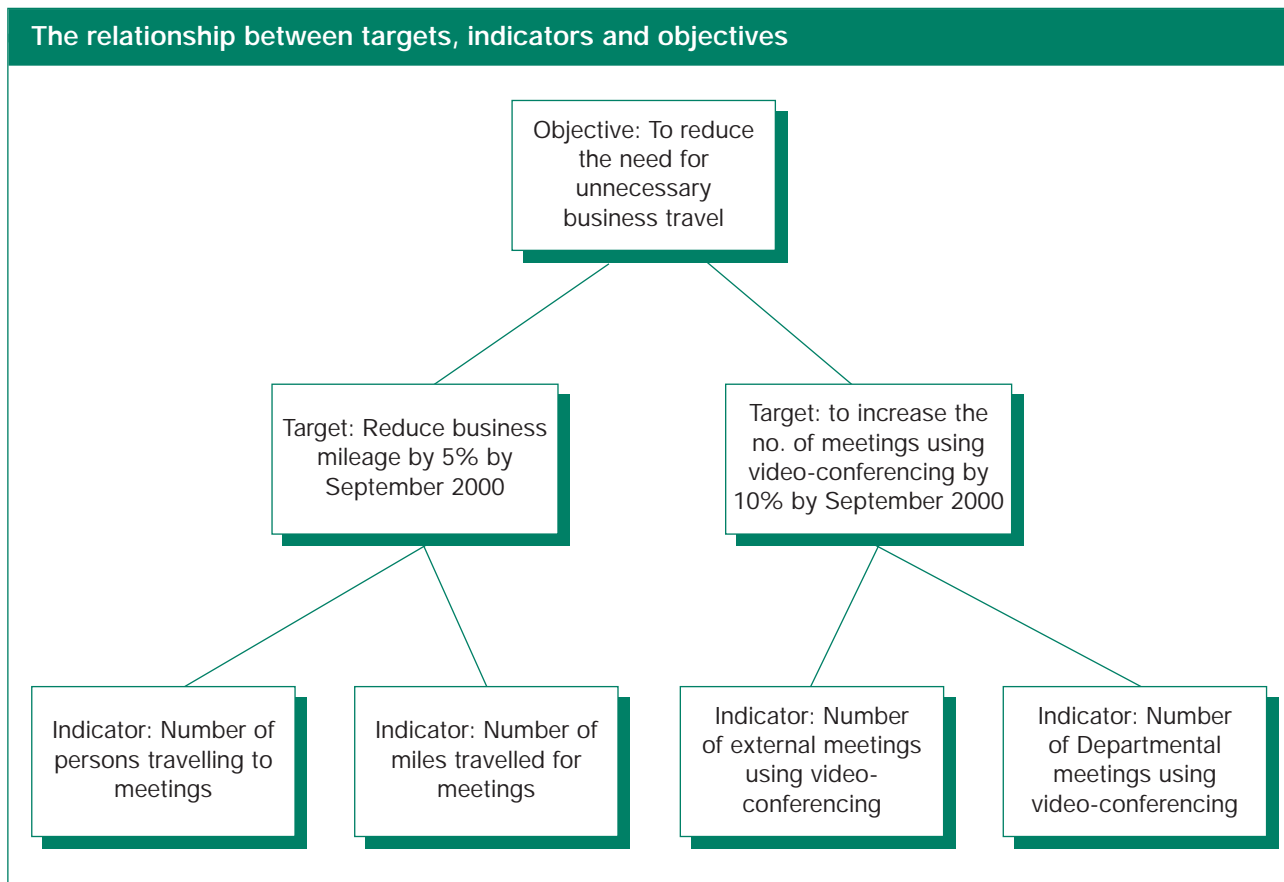
4.1 Objectives, targets and indicators

4.1.1 Objectives give the travel plan focus and direction. Targets are the goals that can be used to assess whether or not the objectives are being achieved. At a third level, indicators are the individual elements of the plan which show you whether the targets are being met and the objectives achieved. To develop a successful travel plan, you must differentiate correctly between the three. The following diagram illustrates the relationship between objectives, targets and indicators.

4.1.2 A travel plan is not set in stone. The purpose of defining objectives, targets and indicators is to help you to monitor changes and, where change is not achieved, to amend those elements which have not worked.

4.2 Setting objectives

4.2.1 The objectives should be clearly set out in the plan. They will depend on your department's motives in developing a travel plan and on the particular circumstances of your site. Your objectives can relate to the workforce or to other groups such as visitors, contractors or deliveries.



4.2.2 When setting objectives it is helpful to reiterate the benefits of the plan to individuals, the department, the community and the environment. The 1999 round of travel plans for headquarters and other main buildings included these objectives amongst others:

- to reduce the need for unnecessary travel and to ensure that those that do have to travel (both staff and visitors to Bridge House), do so in a way that is sustainable (GOSE);
- to reduce the effects of the DETR (Central) activities on the environment year by year (DETR (C)); and

4.3 Identifying targets and indicators

4.3.1 We measure the success of a travel plan by whether it achieves its objectives through a set of targets. These targets, which relate back to the objectives, can be 'action' targets or 'aim' targets.

4.3.2 'Action' targets are non-quantifiable tasks to be undertaken, ideally in line with clear target dates. They tend to be one-off events, and can provide you with some quick wins and help to keep the travel plan going.

4.3.3 Examples of 'action' targets include:

- all staff to receive a travel awareness guide (DETR (C));
- providing guaranteed parking spaces for car sharers within one year (Highways Agency); and
- investigating whether information on London Transport's website can be mirrored on the Government Office for London's intranet (GOL).

4.3.4 'Aim' targets are quantifiable, but should not be seen as set in stone, with a price to be paid if they fail. They are targets to work towards over a period of time. Proper monitoring (Section 7) shows whether the objectives and targets in the travel plan need re-evaluation.

4.3.5 You should base your commuting and business travel targets on the results of the staff travel survey. This ensures they relate to the opportunities you have identified. If only 5% of staff are interested in cycling to work, it would not be realistic to set a target of increasing this to 20%.

4.3.6 Examples of 'aim' targets include:

- reduce commuting by car by 5% by January 2000 (GOWM);
- achieve a 10% increase in those sharing a car to the station over three years, from a 1999 baseline (DETR);
- reduce annual business mileage by 7% by 2000, compared with 1996/7 (Environment Agency); and
- increase the proportion of business trips by public transport and reduce annual business mileage by 5% each year, with a review by the end of April 2000 (GO-EM).

4.3.7 It is helpful if the travel plan has a mix of 'action' and 'aim' targets. This will give you some quick wins and make it easier to assess the travel plan's effectiveness. You should include deadlines for meeting your targets which cover:

- the short term (up to one year);
- the medium term (1 to 3 years); and
- the long term (more than three years).

4.3.8 By ensuring your staff know when targets have been met, you will keep their interest and maintain the momentum of the travel plan. (See Section Six on publicity)

SECTION FIVE

Identifying Measures

This section outlines some of the measures necessary for a successful travel plan. First we examine the commuting journey and secondly we look at travel during the working day. A package of ‘carrot and stick’ measures is generally most effective in changing travel behaviour. It may be better to introduce some ‘carrots’ before any ‘sticks’. You can use the results of the staff travel survey and other audits to identify those measures most suitable for your department. It is also important to involve the staff, either through the Consultation Group or directly.

DSS, St. James’ House, Newcastle promotes travel and personal safety initiatives by inviting the Crime Prevention Officer, the Transport Police, representatives of the Suzy Lamplugh Trust and others to give talks. The DSS also ensures that posters and publicity material are placed on a green notice board.

In response to the staff who expressed their concern about personal security, to/from park and ride sites, GOSE is making available, on request, a number of personal alarms from its facilities branch.

5.1 Walking

5.1.1 Walking is an excellent way to keep fit and is free, but only one in 10 people walk to work. Walking is best suited to journeys of less than two miles or as part of a longer trip by public transport. The staff travel survey will show whether it is worth promoting walking for part or all of the commuting journey.

5.1.2 In London and some metropolitan areas, commuting journeys are too long for walking and many people already use public transport. You may be able to interest people in walking at the home end of their journey rather than, for example, driving to and from a rail station. This has health benefits and reduces travel costs as it cuts the cost of running a car and eliminates parking charges at the station.

5.1.3 In many places, you need to look at the safety issues related to walking. Although they are not directly responsible for public footways, Government departments can influence the local authorities that are responsible. Improved signs, lighting and quality of paving all help to make walking more attractive.

5.1.4 Wherever possible, you could encourage staff to walk to meetings at other nearby offices, rather than driving.

5.2 Cycling

5.2.1 Cycling is an easy way to introduce physical activity into everyday life and can contribute to a healthier and more productive workforce. The running costs are low, you can avoid traffic jams and journey times are more predictable. However, fewer than four in every 100 commuter journeys are by bike. Many commuting journeys are short enough to cycle (up to five miles) providing the conditions are right.

5.2.2 The staff travel survey should reveal which of your staff cycle to work, and what their views are on the existing cycle facilities. The survey will also alert you to any perceived barriers to cycling. You may be able to increase interest by improving the facilities.

5.2.3 There are many ways to encourage staff to cycle to work and on business journeys during the day. These include:

- providing convenient, secure and covered cycle parking;
- providing lockers, changing facilities and showers;
- providing an ironing board and iron;
- offering interest-free cycle loans, discounts for cycle and safety equipment purchase and preferential cycle insurance rates;
- providing a cycle mileage allowance for business travel;
- providing pool bikes for business travel; and
- promoting cycling generally, and the above initiatives in particular.

DETR (C) offers those who cycle secure parking facilities, showers, lockers and loans for buying bikes.

5.2.4 You could also consider developing a partnership with your local authority to influence its local cycling strategies. If you identify where improvements or new cycling links are needed to your building, the authority may work with you to provide them.

5.2.5 A bicycle users group is a valuable means of generating and maintaining interest in cycling. This group could also provide training sessions, organise outings or give advice and assistance with bike maintenance.

5.3 Public transport

5.3.1 Overall, fewer than one in ten commuters travel to work by bus. One in 20 goes to work by train. Many people feel that public transport is beyond the department's control, and thus it is very difficult to encourage people to use it more. In fact there are several initiatives that could encourage staff and visitors to use public transport for commuting and business travel.

INFORMATION

5.3.2 Many drivers simply do not know anything about the bus and train services available.

Providing public transport information is an important step towards persuading people to stop using their cars, at least for some journeys.

5.3.3 The local operators usually produce timetables and route maps that could be either distributed to staff or displayed prominently in the building. On-line timetable information might also be an option. The operators may provide any information if it is not already available.

Customs and Excise staff in Kings Beam House in London have individual access to the Railplanner computer package at their desks.

In line with the Transport White Paper commitment, a national public transport information system is to be in place in 2000.

TRAVEL COSTS

5.3.4 Many people say that public transport is too expensive. Staff discounts for season ticket loans are effective in promoting more use of public transport. Packets of tickets, or carnets, may also encourage people to use public transport on an occasional basis.

5.3.5 Some departments offer interest-free loans for bus or rail season tickets. This spreads the cost of a long-term season ticket over the year, possibly via direct payroll deductions.

GOWM staff who permanently surrender their right to a parking place can get a 50% discount on a travel pass for a year. The discount scheme is operated by Centro, the PTE for the West Midlands.

5.3.6 Once members of staff have season tickets or travel cards, they are more likely to use public transport for business travel as well as commuting.

SERVICE CHARACTERISTICS

5.3.7 Inconvenient timetables and routes sometimes put people off using public transport. You could try negotiating with the transport operators on changing some services. This is a long-term process and may require a lot of effort. You might increase your bargaining power by working with other organisations.

5.4 Motorcycles/mopeds

5.4.1 Small motorcycles and mopeds are quicker in congestion, have lower running costs and may be more environmentally friendly than private cars. They create less congestion and take up less parking space. However, you should also consider safety-training programmes for the riders.

5.5 Taxi sharing

5.5.1 In some places the image of the car is important, not just its convenience. In rural areas where public transport services are infrequent, staff may be prepared to share a taxi to work. The more people that share a taxi the better, to reduce the number of cars used and the cost to the individual. You could negotiate a contract with a local taxi company that offers preferential rates to your staff. The same company could also operate the guaranteed ride home scheme as part of a car-sharing scheme (Section 5.6).

5.6 Car sharing

5.6.1 More than 80% of commuter journeys by car are made by people driving alone. For some drivers, it will be more attractive to share a car some of the time than to switch to a completely different form of transport, such as bus or bicycle. Car sharing is a flexible option – journeys can be arranged on an agreed number of days with one or more colleagues. You need to try to match staff members appropriately when you encourage them to take part in the scheme. You will also need to guarantee taxis for the journey home when necessary, although evidence shows that this option is rarely used.

DSS, St. James' House, Newcastle is using ACCESS to set up a database for car-sharing based on postcodes identified in the staff travel survey.

GOSE encourages line managers to be sympathetic to the needs of car-sharers to leave at a set time.

5.6.2 Car-share coffee clubs are a good way of encouraging car sharing. Potential sharers get to know each other, which minimises the risk of bad pairings. Simple methods such as coloured badges for people living in similar areas make it easier to identify possible partners.

5.6.3 You should promote the financial savings that people will make by sharing their car. The savings can be considerable, particularly where distances are long and several colleagues share one car.

As a means of achieving its aim of reducing car commuting by 20% by 2003, Stockley Park, Britain's first US-style business park, near Heathrow, has developed an on-line database accessible to all employees at the Park. The system allows people to search for suitable car-sharing partners, and send e-mail messages to set up car-sharing arrangements.

5.7 Car parking

5.7.1 Workplace car parking will be one of the most important factors influencing whether or not staff drive to work. Charging for parking space or at least raising awareness of the cost of car parking is likely to provide an incentive for people to share their cars. You could also give priority in the car park to those who are already car sharing. The 'sticks' must complement the 'carrots' in other measures.

DSS, St. James' House, Newcastle is reviewing its parking allocation to produce a new policy/guidance, with a view to excluding those staff living within a mile of work.

5.7.2 Reducing the number of car parking spaces can save departments significant sums in maintenance, and allows for more cycle or motorcycle racks.

5.8 Reducing the need to travel to work

5.8.1 Your department could consider changes to the way it works. Flexitime might enable staff to work only four (longer) days a week or a nine-day

fortnight. Teleworking allows staff to work away from the department, at home or in a satellite office. Teleworking may require specific IT provision such as e-mail connections, fax machines and designated phone lines.

5.8.2 Although it is not appropriate for all jobs, teleworking can bring a number of benefits. These include:

- increased productivity (there are fewer distractions);
- time and cost savings (staff do not travel so much);
- making it easier for staff to combine work and family life; and
- reducing commuting trips (by 10 per cent if working from home one day each fortnight).

This brings benefits to the individual, the department and the environment.

DETR (C) has opened a pilot telecentre in Hastings.

Staff of the Planning Inspectorate write all reports of site visits at home rather than at the office.

5.9 Reducing the need for other travel during the working day

5.9.1 There are several ways to reduce the amount of business travel. Encouraging people to use public transport, to cycle, to share cars and to co-ordinate their meetings can all play a part. Video conferencing might also help.

The Countryside Agency is creating a pool of foldaway bicycles that can be taken on trains and then used for site visits.

Video-conferencing facilities were installed in the GOSW Bristol and Plymouth offices in November 1998. In the subsequent four months, they were used on 33 occasions, contributing to up to 50 fewer car journeys, and a reduction in rail journeys.

DSS, St. James' House, Newcastle is looking at introducing a system that shows the business journeys scheduled on a day-to-day basis, to encourage car sharing.

5.9.2 You could reduce the need for staff to travel during the lunch period by offering catering and banking facilities. Many catering companies now deliver a sandwich and snack service to office premises.

5.10 Visitors

5.10.1 The travel choices that visitors make are not directly under your control. However, you should try to influence their choices by making them aware of the public transport options available. You will also find that their choice is related to the parking spaces allocated to visitors. The fewer the spaces, the greater the incentive to travel another way.

Through a PFI bid, Croydon Council is investigating the feasibility of using IT to improve remote access to Council services by its customers and clients, and also to reduce the need for Council Staff to travel to Council offices to perform their functions.

5.11 Deliveries

5.11.1 Departments cannot usually control the operating practices of their suppliers. However, you might influence them by including environmental issues in contracts. Suppliers bidding for contracts should be aware of the department's travel plan.

DSS, St. James' House, Newcastle is investigating the inclusion of environmental performance criteria in procurement policies for courier companies.

Croydon Council recommends its departments prepare specifications for contracts which will involve the widespread use of transport (deliveries etc) to ask suppliers to demonstrate how they will reduce the transport they use, and to encourage compliance with the Good Lorry Code and/or the Clean Air Charter.

5.12 Fleet vehicles

5.12.1 The type of vehicle and the way the fleet is operated have both environmental and financial implications.

VEHICLE SELECTION

5.12.2 When selecting department vehicles you should consider fuel efficiency and whole life costing. You could test new, cleaner and greener technologies, as they become available. Some suppliers are happy to supply a vehicle on loan for a trial period free of charge, as publicity for the service they provide.

DSS has a policy to introduce an increasing number of bi-fuel vehicles into its fleet. The aim is to have 10% of the official fleet bi-fuelled by 1 April 2000, 25% by 1 April 2001, and 40% by 1 April 2002.

FLEET OPERATION

5.12.3 You can determine the optimum fleet size by monitoring the use of individual vehicles. Your monitoring should include fuel consumption, distances and any other issues affecting performance such as type of loads carried and the terrain covered.

5.12.4 You should consider using information technology. Route planning systems in the vehicles can cut costs by reducing mistakes. They also improve driver performance by reducing stress.

5.12.5 You could consider training courses for drivers to learn environmentally friendly driving techniques. Regular vehicle maintenance, to ensure optimum performance, is also valuable.

5.12.6 It is easier for many fleets to reduce their fuel consumption than to reduce mileage. The Cleaner Vehicles Task Force, which promotes the production, purchase and use of vehicles which are more fuel efficient, less polluting and quieter, provides advice on which vehicle to buy. The Force is introducing a greener fleet certification scheme, to encourage green fleet management as good business practice.

SECTION SIX

Awareness Raising and Marketing

6.1 Formulating a clear marketing plan

6.1.1 One of the main concerns when preparing a travel plan is that staff will not take it seriously, will not participate in it or will not accept ownership of it. Some members of staff will feel threatened by the changes a plan proposes.

6.1.2 It is important to try to win hearts and minds from the beginning. Publicising the travel plan and securing staff involvement cannot begin too early. You need to reassure people that the plan is not anti-car, and will not ban all cars; it is to give them more choice and encourage them to try alternatives.

6.1.3 You must promote the travel plan and include the staff at all stages. You must publicise the problems and proposed measures widely, along with your successes.

6.1.4 Marketing is easier with slogans and catchy names. You may decide on an appropriate tag or banner to publicise your travel plan. An excellent way to generate early staff involvement is to organise a competition for the most appropriate name.

Examples of slogans currently used include:

- Is Your Journey Really Necessary? – The Highways Agency
- Environmental Sense is Common Sense – Inland Revenue, Cumbernauld

6.1.5 There are several ways of keeping staff informed. You should also consider how to maintain their awareness and interest. You will need more than one approach to keep the plan in people's minds and to reinforce the message with one-off events to publicise specific measures. You should publicise all successes, however small, with the names of those involved clearly specified.

The Highways Agency uses a variety of channels of communication – including intranet – to keep staff informed of progress on their green travel plan.

6.2 Awareness raising initiatives

6.2.1 A marketing campaign could include:

- information and briefing notes for senior managers;
- articles and photographs in staff bulletins or newsletters;
- personal briefings for staff and trade union representatives;
- poster campaigns – preferably themed; and
- tee shirts and sweatshirts for those who join a group like a bicycle user group.

6.2.2 The success of these initiatives depends on how much and how often they are used and whether staff consider they are involved. You should consult within the department, possibly as part of a staff travel survey, to find ways of

promoting the travel plan. Events that involve staff and their families may be useful, particularly when not travelling to work by car may affect the way children go to school. Some staff may respond to changes to the travel and subsistence policy to give bike mileage rates; others may appreciate the fun aspects of having group social events and outings.

6.3 National and local campaigns

6.3.1 It is useful to link your department's travel plan activity with national events such as the car free day and national bike week. Staff will see they are contributing to something beyond the department. This reduces any feelings of being singled out.

Since 1997, GOWM has marked National Car Free Day by running a series of events for staff to raise awareness of and support for green transport. Events include a sponsored walk and cycle over the lunch time period, with proceeds going to charity, and free breakfast to staff who walk or cycle to work.

6.3.2 You may find that affiliation with regional travel plan activities is particularly relevant to your department. The TravelWise campaigns operated by local authorities around the country are often helpful. Regional offices of the Central Office of Information, currently acting as regional media co-ordinators for the DETR *Are You Doing Your Bit?* campaign, provide valuable advice and campaign materials. You can contact the campaign office hotline, *Are You Doing Your Bit?*, on 020 7544 3131.

6.4 Getting new recruits on board

6.4.1 The success of any travel plan depends on the commitment of management and staff. Those involved at the outset will hopefully contribute to the plan's development and continued success. This development path differs from place to place.

6.4.2 It is important that those joining the department are made aware of the nature and status of the travel plan as early as possible in the recruitment process, regardless of their status within the organisation. The departmental ethos regarding green travel should be given the same emphasis as other aspects of the employment package, such as responsibilities, hours of work, overtime policy or dress code.

SECTION SEVEN

Monitoring

7.1 The importance of monitoring

7.1.1 A travel plan is not a one-off event. It is a dynamic process that should grow and develop over time. It is only possible to measure that process with a clearly defined monitoring programme. The impact of any new measures and policies needs to be checked systematically.

7.1.2 Monitoring assesses how things have changed, and whether the targets are being met. Monitoring should relate to the achievement of targets if the stated objectives are to be met. It is important to include all aim and action targets in the monitoring, regardless of their time scales.

7.1.3 When drawing up the initial travel plan you need to decide on the following:

- which aspects need to be checked regularly;
- who is responsible for monitoring;
- how frequently and when the monitoring will be conducted;
- how the monitoring will be done;
- how the results will be disseminated to staff; and
- how results will inform a review of the travel plan.

7.1.4 If some initiatives have no effect, or a particular target is not met, you need to reconsider the problems and proposed measures, and try to

avoid blame and recrimination within the department. A target may have been too ambitious for its original time scale, but could be achieved at a later date; or circumstances may have changed, making it unlikely to be met.

7.1.5 Monitoring should help to produce new or refined targets and an appropriate campaign to support their achievement. It is important to recognise and learn lessons from any failures and not to use any failure as a reason to withdraw from the travel plan.

7.2 The monitoring process

7.2.1 You must keep the methods you use for monitoring consistent over time, so you can compare results properly. You should also make sure they are the most appropriate methods. It may help to make regular counts of the vehicles in the car park and the number of bikes in the cycle shed and to analyse the number of travel cards and carnets issued. This will show you whether staff members are changing the way they come to work.

7.2.2 You should reinforce these methods by regular staff surveys. Ideally the surveys should be done on a single day each quarter, avoiding Mondays and Fridays, school holidays and any local events likely to influence people's travel. They do not need to be full surveys: snapshot surveys to discover how staff travelled to work on the day in question may be sufficient. There is an example of such a survey in the ETSU resource pack.

7.2.3 You will achieve maximum co-operation if you keep the surveys simple, anonymous, and within working hours. When interpreting the results, you will need to take into account other factors that could influence travel-to-work patterns, such as teleworking.

7.2.4 Other indicators will help you to monitor the progress of the travel plan. These include the number of bus passes issued, the number of cycle loan applications, the number of bicycle user group members, the number of business miles in travel and subsistence claims and the number of staff in the car-share database.

7.3 Maintaining the momentum

7.3.1 It is essential that you nurture the commitment and enthusiasm of your staff, as it is vital for the travel plan's success. You can promote enthusiasm by publicising any successes and providing information about the next steps. Disseminating the results of the monitoring through staff newsletters, bulletins and posters can form part of a continuous marketing policy (Section 6.2.).

SECTION EIGHT

Financial and Legal Issues

8.1 Costs

8.1.1 An effective travel plan costs money and time. The figures will vary from department to department, but the main costs are:

- the travel plan co-ordinator;
- travel surveys and audits;
- staff time for meetings;
- publicity and marketing;
- monitoring; and
- the measures which form part of the plan.

8.1.2 The actual cost will depend on the number and type of measures in the plan and the level of importance the Department gives the plan. (See the Benefits Guide for further information – details in Annex C).

8.2 Benefits of a travel plan

8.2.1 An effective travel plan can have financial and other benefits. (See Benefits Guide – details in Annex C). It can achieve:

- significant reductions in the costs of car park provision and maintenance;
- reduced business mileage on travel and subsistence claims;

- reduced requirement for office space;
- reduced ‘dead’ time due to staff driving to meetings;
- improved overall productivity from teleworking, a nine-day fortnight and teleconferencing; and
- healthier, more productive staff.

8.2.2 There are other less-quantifiable benefits from increased staff morale, an improvement in the department’s image through ISO 14001 accreditation and involvement in national green transport events.

8.3 Taxation implications

8.3.1 In designing travel plan measures to change travel habits, you should not be put off by the view that the measures may be seen as benefits in kind. Although many people earning more than £8,500 per year are liable to pay tax on such benefits, there are many measures which are exempt from tax.

- Work buses to seat 12 or more, used to bring employees to work, are tax exempt.
- Public bus service subsidies for extensions or amendments to services used by staff to travel to work are exempt from tax, provided that staff pay the same fare as other members of the public.
- Loans offered to buy a public transport season ticket or a bicycle on preferential terms are tax exempt when the outstanding balance is less than £5,000.

- Season ticket discounts provided by employers are not tax exempt unless the employer negotiates a bulk discount. The discount should come from the public transport operator, not the employer.
- Bicycles and cycling safety equipment for staff to travel between home and work is exempt from tax, as is workplace parking for bicycles and motorcycles. Employees who use their own cycles for business travel can claim capital allowances on a proportion of the cost of the bicycle. You can pay staff up to 12p per mile, tax free, for using their own bicycles on business travel.
- Providing a guaranteed journey home as part of a car-sharing scheme when the arrangements temporarily break down because of 'unforeseen and exceptional' circumstances, does not make the employee liable to income tax on the cost of the journey. Staff are not charged tax on the cost of a taxi, hired car or similar private transport provided by a department solely to take them home after work if:
 - they are required to work late (9pm or later) on an ad hoc basis; or
 - at the time of going home, either public transport services have ceased to run or it would be unreasonable to expect staff to use them.
- Staff who are teleworking from home can set against tax all expenses incurred 'wholly, exclusively and necessarily' while undertaking their employment duties. These expenses include telephone calls, heating and lighting. The cost of travel from home to a temporary workplace (but not to the normal workplace) is tax deductible.
- 'Buying-out' an existing parking space, conditional on the take-up of a season ticket, is taxable, and should be taken into account when first assessing the appropriate level of payment.

8.4 Insurance implications

8.4.1 Those in car-sharing schemes should inform their insurance companies. Most insurance companies cover carrying passengers to and from work, so there should be no increase in insurance premiums. The insurance becomes invalid, however, when passengers are charged more than their share of the car's running costs. Those cover fuel, oil, tyres, servicing, repairs and replacements, together with any parking charges incurred.

8.4.2 The charge should be divided equally between the total number of people in the car, including the driver. Alternatively, staff can agree to take it in turns to drive their own cars, so that the costs are equally shared. A guide to motoring costs per mile is provided in the ETSU resource pack.

8.4.3 Where departments introduce teleworking, they must make sure that the terms of their insurance covers equipment not kept in the office, including equipment used on the move. Workers who use their own equipment for work should check that it is covered by their own home insurance policy.

14 Which of the following changes would most encourage you to use public transport for your journey to work ? (If you already commute by public transport, which would you most like to see?) Please tick no more than 2.

- More direct bus routes 01
- More frequent bus service 02
- Better lighting at bus shelters & work paths 03
- Discount tickets/passes available at work 04
- More convenient bus drop off points 05
- Better connection to work from the station 06
- Better connection from home to the station 07
- Public transport information 08
- Other (Please specify) 09

.....
 None 10

Please complete questions 15 - 19 if you use a car to get to work

15 What are your main reasons for using a car to get to work ?

- Car essential to perform job 01
- Dropping/collecting children 02
- Get a lift 03
- Health reasons 04
- Lack of an alternative 05
- Other, please specify 06

.....

16 Where do you usually park ?

- At work 01
- Free parking in nearby street 02
- Paid parking in nearby street 03
- Paid parking in commercial car park 04

17 Would you be prepared to car share ?

- Yes 01
 - No 02
- If no, please say why

.....

18 Which of the following would most encourage you to car share ? Please tick no more than 2

- Help in finding car share partners with similar work patterns 01
- Free taxi home if let down by car driver 02
- Reserved parking for car sharers 03
- Reduced car parking charges for car sharers 04
- Other - please specify 05

.....
 None of these 06

19 Do you have any comments about your travel to work patterns ?

.....

Thank you for your cooperation. Please be assured that all your answers will remain confidential.

Please return this form to:

Name

at

by

If you wish to be included in a prize draw, please write your name and department here. This slip will be separated from the completed questionnaire and used only for the purpose of the draw.

Name

Department

Address

.....

APPENDIX B

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APPENDIX C

Other useful information sources

- A1 – Government’s Energy Efficiency Best Practice Programme (2000)**
A travel plan resource pack for employers: An essential guide to developing, implementing and monitoring a travel management strategy for your organisation

The travel plan resource pack is a one-stop ‘dip-in’ practical resource on all aspects of developing, implementing and monitoring a travel plan. The pack is appropriate to all types of organisations and is primarily intended as a working tool for use by the travel plan co-ordinator.

The resource pack will also provide details of many more sources of useful information and advice.

The pack can be ordered by contacting the Government’s Energy and Environment Helpline, managed by ETSU, on Tel. 0800 585794.

- A2 – DETR (1999)**
Preparing your organisation for transport in the future: The benefits of Green Transport Plans

This guide highlights the costs and benefits of travel plans, setting the costs of such plans in the context of employers’ existing transport-related expenditure, and looking at how costs can be overcome or reduced. It draws upon the practical experience of UK employers developing and running their own plans. An accompanying leaflet is aimed at Chief Executives to persuade them of the merits of travel plans and to enable their

colleagues to prepare a business case to establish the real value of such a plan in the management context.

Free copies of the guide are available from:
 DETR Free Literature
 PO Box 236
 Wetherby
 LS23 7NB
 Tel: 0870 1226
 Fax: 0870 1226 237
 Quoting reference 99ASCS174A or visit the DETR website.

- A3 – DETR (1997)**
Guide to Green Transport Plans – Advice for Government Departments

This first guide for Government Departments is available on the travel plan pages of DETR’s website

- A4 – Transport 2000**
Changing journeys to work: an employer’s guide to green commuting plans

A guide aimed at employers seeking to set up a green commuter plan. All stages of implementation are included, from collection of key data to car-sharing and cycling initiatives. Benefits and barriers of initiatives are clearly identified.

- A5 – DETR Website**
<http://www.local-transport.detr.gov.uk/travelplans/index.htm>

Provides information on travel plans. Other useful information, for example on greening government activities, can also be found on the main website.