

TAYSIDE AND CENTRAL SCOTLAND TRANSPORT PARTNERSHIP**24 JUNE 2008****TRAVEL PLAN STRATEGY AND ACTION PLAN 2008/09****REPORT BY DIRECTOR**

This report updates the Partnership on progress on implementation of the Travel Plan Strategy and seeks approval of a Travel Plan Action Plan for 2008/09.

1 RECOMMENDATIONS

1.1 That the Partnership:-

- (i) notes the progress achieved on Travel Plan activity to date, as outlined in Appendix A;
- (ii) endorses expenditure incurred in support of promoting Travel Plans, liftsharing and active travel in association with national campaigns, as outlined in the report;
- (iii) approves a Travel Plan Action Plan for 2008/09 and associated expenditure, as detailed in section 3.10 of the report; and
- (iv) approves a revised Sustainable Travel Grant Scheme as detailed in Appendix B.

2 BACKGROUND

- 2.1 At its meeting on 17 August 2006 (Report RTP/06/28 refers) the Partnership approved the appointment of a Travel Plan Officer on a permanent basis, to fulfil specific travel planning objectives, which are set as conditions of Scottish Government Grant funding for Travel Planning activity and to develop longer term initiatives in line with emerging Regional Transport Strategy objectives.
- 2.2 All Regional Transport Partnerships were required to submit a Travel Plan Update Report to Scottish Government by 31 May 2008. This is a condition of securing continued funding available through Scottish Government for Travel Planning activity in 2008/09 – 2009/10. Progress during 2007/08 is set out in the Travel Plan Update Report which forms Appendix A.
- 2.3 Scottish Government has offered TACTRAN further Grant of up to £104,000 in 2008/09, with a reduced maximum Grant of £35,000 in 2009/10. In addition to Scottish Government Grant, the Partnership previously agreed that a projected underspend of £35,000 in the 2007/08 Revenue Budget would be allocated to supporting Travel Plan activity in 2008/09 (Report RTP/08/04 refers), resulting in a Travel Plan budget of £139,000 in 2008/09.

3 DISCUSSION

- 3.1 The Scottish Government Grant for financial year 2008/09 requires the submission of a number of Travel Plan Case Studies, 2/annum for each local

authority and Health Board. These case studies will be developed in consultation with constituent Councils and Health Boards between June 2008 and April 2009.

- 3.2 The key deliverable by the end of 2007/08 was to support development of effective Active Travel Plans in all four constituent Councils and Health Boards within the TACTRAN region. Progress on this is detailed in Appendix A.
- 3.3 The key deliverable for the current and next financial years is to ensure that Local Authority and Health Board Travel Plans cover at least 60% of staff by April 2009 and 80% by 2010. Evidence required will be in the form of case studies, supported by an Action Plan detailing measurable, sustainable and active travel outcomes that TACTRAN and Councils/Health Boards will be implementing. Successful delivery of these outcomes and supporting initiatives will be dependent on commitment from all local authorities and Health Boards. As the majority of Scottish Government Travel Planning Grant is delivered in 2008/09, it is imperative that the majority of the target outcomes outlined in the Conditions of Grant are progressed and, where possible, implemented during this financial year.
- 3.4 Of the available £139,000 budget for Travel Plan activity, £30,000 is allocated towards meeting staff costs, leaving £109,000 available to support Travel Plan development and supporting measures.
- 3.5 It is proposed that £40,000 is allocated towards continued operation of the Partnership's Sustainable Travel Grant Scheme, which provides match funding to public sector bodies to support implementing sustainable travel measures in support of RTS and related Travel Plan Strategy objectives. This proposal builds on TACTRAN's existing, successful Sustainable Travel Grant Scheme. Successful Sustainable Travel Grant (STGS) bids in 2007/08 are detailed below.

Organisation	Scheme	Grant Claimed
Angus Council	Angusliftshare.com promotion	£3053
Dundee City Council	Upgrade cycling/walking element of dundeetravelinfo.com	£10,000
NHS Tayside	Staff pool bike scheme	£4,314.27
	Staff pool bikes	
Perth and Kinross Council	Survey and travel plan promotional material	£1,200
	Travel Plan Survey	
TOTAL		£18,567.27

- 3.6 In order to encourage and stimulate low-cost initiatives it is proposed that the present STGS scheme conditions are altered to permit consideration of applications for projects costing less than £1,000, which will not require match funding, subject to meeting the other scheme conditions and criteria. Bids in

excess of £1,000 up to an assumed maximum grant value of £5,000 will continue to require 50% match funding from applicants or other funding sources, with consideration being given to higher bids on their merits as is stated in the existing conditions. Revised scheme conditions reflecting these proposed changes are included at Appendix B. The success of the STGS scheme has already prompted further enquiries from Health Boards and Local Authorities for funding in 2008/09.

- 3.7 It is proposed that the remaining budget of £69,000 will be used to support measures aimed at satisfying the conditions set out by Scottish Government. This would include general active travel campaigns and promotions which will encourage the specified public sector organisations and their employees to try and habitually use more sustainable forms of transport.
- 3.8 In support of encouraging wider public participation in active travel, the opportunity has been taken to promote the Travel Plans, Active Travel and the Partnerships' tactranliftshare.gov scheme through a variety of intensive media advertising campaigns in association with National Liftshare Day and other national "green travel" promotions. The Partnership is asked to endorse this activity, which has been undertaken at a cost of £5,113 from the 2008/09 Travel Plan budget.
- 3.9 Based on the successful growth in public awareness of TACTRAN's Liftsharing websites which has resulted from previous promotional campaigns, it is proposed that further general media advertising campaigns are developed throughout the year, in consultation with Travel Plan partners and other relevant bodies. A proposed budget of £19,000 is suggested for this promotional activity. Consistent reinforcement of sustainable travel messages is key to achieving sustained success in achieving consistent public awareness and influencing behavioural change.
- 3.10 The remaining £50,000 will be spent on developing specific employee-targeted measures aimed at meeting Scottish Government Grant objectives. These measures will be developed in consultation with constituent local authorities and Health Boards through TACTRAN's Sustainable Travel Liaison Group (STLG), and will be reported back at a future meeting. The proposed Action Plan and related expenditure is summarised below:-

Proposed Travel Plan Expenditure for 2008/09

Purpose	Cost
Staffing	£30,000
Sustainable Travel Grant Scheme	£40,000
Promotional and media campaigns	£19,000
Targeted measures to meet SG Objectives with Councils and Health Boards	£50,000
Total	£139,000

4 CONSULTATIONS

- 4.1 The report has been prepared based on consultations with TACTRAN's STLG members and Scottish Government Officials.

5 RESOURCE IMPLICATIONS

- 5.1 The costs associated with continued development of the Partnerships Travel Plan Strategy and associated 2008/09 Action Plan will be met in full from Scottish Government Grant of £104,000 for this purpose, plus a previously approved allocation of £35,000 within the Partnership's own approved Revenue Budget for 2008/09.

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NOTE

The following background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (and not containing confidential or exempt information) were relied on to a material extent in preparing the above Report; (list papers concerned)

Scottish Government Offer of Grant to TACTRAN for Mainstreaming SMART Measures By Local Authorities and Health Boards: May 2008



Tayside and Central Scotland Transport Partnership

30th May 2008

Travel Plan and Scottish Government Grant Progress Report

Background

A permanent post of Travel Plan Officer, to fulfil specific Scottish Government travel planning objectives, was appointed in January 2007. The post largely fulfilled these objectives through Scottish Government Grant funding for financial years 06/07 and 07/08.

Travel plan and sustainable travel related initiatives will be continued, in line with the National Transport Strategy and Regional Transport Strategy Objectives.

Travel Plan Activity Undertaken 2007/08

Since May 2007 Tactran's Travel Plan Officer has undertaken key deliverables from the Scottish Government Grant guidance. Having continued working relationships with each Local Authority (Angus, Dundee City, Perth and Kinross and Stirling) as well as the two Health Boards (NHS Forth Valley and NHS Tayside) and two Universities (Dundee and Stirling) there has been good progress towards establishing effective travel plans across the region.

Additionally, grant funding has been allocated and spent to help meet specific objectives, including promoting sustainable travel and encouraging actions and initiatives aimed at changing travel behaviour. Approval to carry forward £4,000 from financial years 06/07 to 07/08 was given by the Scottish Government on 17th May 2007 bringing the total budget available to £72, 446:.

Tactran is represented on national groups, conferences and seminars including: The Scottish Sustainable Liaison Group, Travelwise/ACT meetings, Sustrans, NHS Facilities Scotland and Cycling Scotland. Tactran's Travel Plan Officer has been Chair of the Scottish Sustainable Liaison Group since May 2007.

Detailed Progress and Delivery to date

The progress of the travel planning deliverables is detailed according to Annex A of The Scottish Government Travel Plan Officer Guidance.

- The Tactran Travel Plan Strategy and Action Plan submitted in 06/07 has been used as guidance for work conducted in 07/08.
- Tactran's Travel Plan Officer worked in conjunction with local authorities, to develop and implement effective travel plans. All local authorities have established written travel plans with all having implemented positive travel plan measures. They are all working towards establishing travel plans adopted by the Councils.
- Tactran's Travel Plan Officer has worked in conjunction with the two Health Boards in the Region to develop and implement effective travel plans. NHS Tayside has Board approval for their travel plans at both Perth Royal

Infirmery and Ninewells Hospital. They are continuing their efforts with implementation from previous years and have recruited two dedicated members of staff to manage the plans.

NHS Forth Valley have Board Approval and submitted their relocation travel plan to Falkirk Council which is required as part of planning conditions. A response from the local authority is intended by December 2008. They have continued to implement and promote measures in advance of the site move.

- Working relationships with local authorities and neighbouring Transport Partnership Travel Plan Officers have been well established through working groups. Best practice and shared resources are ensuring a seamless approach to travel planning in Scotland.
- Tactran has established a Travel Plan Liaison Group which is compiled of local authority, health board and University representatives. This has ensured a seamless approach to travel planning in the region and has allowed for partnership working in the form of jointly funded initiatives.
- Tactran launched its Sustainable Travel Grant Scheme which allocated £20,000 of funding towards match funded initiatives for local authorities, health boards and universities. The grant was fully allocated with positive schemes implemented across the region.

- Travel Planning is a key element of Tactran’s Regional Transport Strategy, which relates to Delivering Environmental Sustainability, Health and Well-being,. These include:
 - Working with local authorities and developers to ensure that development proposals include travel plans that maximise the potential for walking, cycling, public transport and other sustainable travel choices, including through continued use of planning agreements;
 - Taking a lead in the promotion and development of active travel plans at major centres of employment, hospitals and other main health establishments, in partnership with Councils, Health Boards and private sector;
 - Promoting a range of SMART measures, including travel plans, travel awareness campaigns, high quality travel information, region-wide car sharing schemes, cycling and walking infrastructure and initiatives, development of tele-working etc.
- Tactran is working in liaison with the Scottish Government and other sustainable travel organisations (including Travelwise/ACT, Sustrans and The Energy Savings Trust) to ensure best practice and share knowledge and policy development. Additionally, Tactran is continually looking towards working with public bodies to ensure best practice and a seamless approach towards sustainable travel initiatives. Tactran has contacted the EST and SCARF to engage in joint working towards sustainable travel promotion in the region.
- A travel plan and sustainable knowledge base is being established in the form of guidance and sharing best practice, in conjunction with The Scottish Government, which can be further built upon in future years. Tactran’s Travel Plan Officer has contributed to this process which will include the re-launch of www.chooseanotherway.com
- Tactran upgraded its Liftshare site to become a “Buddy” Scheme, which includes journey matching for those walking, cycling or using taxis. Widespread promotion of this is anticipated for 2008/09.

Travel Plans in Tayside and Central Scotland Partnership

Tactran has marketed and advocated the travel planning concept to the Partnership’s local authorities, Health Boards, Higher Education Institutions and other large employers in the Region.

Travel Planning activities to date include:

Public Sector Travel Plan Development

Angus Council voluntarily commenced their staff travel plan in 2005. Through guidance and support from Tactran's Travel Plan Officer and The EST, Angus Council have now formally adopted a travel plan and are in the process of implementing travel plan measures. They successfully applied for Tactran's Sustainable Grant Scheme to promote their liftsharing site: www.angusliftshare.com

Dundee City Council's travel plan commenced in 2006 have since formalised their document with assistance from the EST and guidance/support. The travel plan is scheduled to be submitted to Committee in Summer 2008. Several travel planning measures have been implemented in advance of formal adoption, including the purchase of staff pool bikes and the cycle purchase salary sacrifice scheme. Dundee were also successful in applying for Tactran's Sustainable Travel Grant Scheme which allowed for a cycling and walking upgrade to www.dundetravelinfo.com and the purchase of staff pool bikes and lockers.

Perth and Kinross Council has established a travel plan for two sites: Friarton Depot and City Centre. This has been conducted with guidance and support from Tactran and EST consultancy assistance. The travel plan has not been formally adopted by Council; however, travel plan measures implementation is well underway having established a dedicated staff member with responsibility. PKC were successful in applying to Tactran's Sustainable Grant Scheme which enabled them to conduct a new staff survey and analysis.

Stirling Council commenced their travel plan in 2006 and has conducted research for which to base a travel plan document. Free consultancy assistance was provided through the EST and Travel Plan Measures have been implemented. Staffing issues have delayed formal adoption from Committee however this is due for Autumn 2008.

NHS Tayside

Ninewells Hospital has continued the success of their existing travel plan, which was developed in partnership with Dundee City Council in 2004. A recent staff travel survey highlighted positive and significant modal shift to sustainable modes. The plan is specific to the Ninewells site and has been featured as a best practice case study with the EST.

Following recommendation from Tactran, a separate site specific travel plan was established for Perth Royal Infirmary. Both travel plans have been fully adopted and supported by the NHS Board.

Ninewells were successful in applying for Tactran's Sustainable Travel Grant Scheme which paid for the implementation of pool bikes, lockers and promotional material for staff.

NHS Forth Valley

Forth Valley Hospital's relocation to Larbert requires a travel plan to be submitted for planning approval with Falkirk Council. This cross boundary move with Sestran benefited from advice from both Regional Transport Partnerships and their Travel Plan Officers. The travel plan will receive formal approval by Dec 2008. Meanwhile, their dedicated Travel Manager is implementing and promoting travel plan measures in anticipation of the move.

Universities and Other Major Employers

The University of Dundee's travel plan established in 2003 is an active and effective plan incorporating both city centre and out of town sites. The travel action group continues to hold regular meetings and has recently allocated specific staff time to continue progress. With ongoing advice from Tactran, the University is currently undertaking a staff travel habits survey with assistance from the EST.

The University of Stirling

The University of Stirling have been working with Tactran and Stirling Council to establish an effective and active travel plan. With consultancy support from the EST, they have established a plan which will incorporate other private companies on their campus site. In time, this may form part of a Transport Management Organisation.

Additional Major Employers

Tactran recruited consultancy assistance to promote the Tactran Travel Plan Toolkit to major employers across the region. These included colleges, public bodies and private companies in the Region. Tactran's guidance and support was highlighted as well as major sustainable travel initiatives including www.tactranliftshare.com.

Resources and Financial Implications – Expenditure

Grant assistance from the Scottish Government totals £130,000 which was made in two instalments of £65,000 in financial years 2006/07 and 2007/08. Approval to carry forward £4,000 from financial years 06/07 to 07/08 was given by the Scottish Government on 17th May 2007. An additional £3,727 of uncommitted grant from 06/07 was carried over to 07/08 by Tactran.

The budget for financial year 2007/08 has been spent as follows:

Travel Planning/Travel Awareness – 2007/08	£
Liftshare promotion	4,379
Cycling to work books in conjunction with partners	2,950
Upgrade of Liftshare to “buddy” scheme	10,000
Promotion of Travel Plan toolkit	3,161
Conference	225
Sustainable Travel Grant Scheme	19,244
Staffing Costs	29,551
Total	69,510

N.B: Of the £3,727 underspend from 06/07, Tactran has spent £510 in 07/08 and the rest will be carried forward to 08/09. Of the outstanding amount £3,217 from 06/07, £1750 was committed expenditure in 07/08; however these goods arrived in financial year 08/09.

More specifically, advertising and promotional costs for financial year 07/08 have been attributed to the following:

- Radio advertising and promotional material to promote National Liftshare Day.
- The upgrade of tactranliftshare, to become a buddy scheme for walkers, cyclists and taxi users across the region.
- Consultancy assistance to promote Tactran’s Travel Plan Toolkit.
- Advertising in Autotrader magazine and online to promote tactranliftshare as part of the “Green” edition.
- Sustainable travel grant scheme which supported pool bike schemes, promotional material and survey reporting, all which received part or full match funding from bidders.

Regional Travel Plan Report/Monitoring

Continued monitoring and establishment of best practice examples will be conducted through Tactran's Sustainable Travel Liaison Group, which includes representation from Local Authorities, Health Boards and Universities.

Additionally, national monitoring and sharing of best practice will be conducted through close working relations with other Regional Transport Partnerships, Sustainable Transport Organisations and The Scottish Government. Additional key stakeholders will be consulted and engaged where appropriate in order to meet the travel planning objectives as outlined by the Scottish Government.

Long term commitment from both the public and private sectors is essential in order to deliver successful outcomes and ensure sustainable and effective active travel plans across the region, the success of which can be monitored and demonstrated through time and best practice. This will require continued funding and other resource commitment from Councils, Health Boards and major employers.

Tactran is committed to the development of travel plans across the region and will continue to support partners and promote sustainable travel initiatives.



Sustainable Travel Grant Scheme Guidance for Applicants

Tayside and Central Scotland Transport Partnership (Tactran) runs a Sustainable Travel Grant Scheme (STGS) to support and encourage Travel Planning and travel awareness throughout Tayside and Central Scotland by providing financial assistance to organisations investing in measures aimed at encouraging sustainable travel.

STGS can be used to support physical measures implemented as part of a Travel Plan and provide support for organisations actively developing a Travel Plan. Schemes funded by the STGS could include:

- ❖ Secure cycle parking and shower/changing facilities;
- ❖ Improving pedestrian access to a place of work;
- ❖ A travel to work survey and monitoring to develop a Travel Plan;
- ❖ Promotional material encouraging sustainable travel amongst staff/students;
- ❖ Employee training in travel planning/walking groups/adult cycle training, or;
- ❖ Any other scheme which encourages sustainable travel amongst staff.

Applications may be made on behalf of:

- ❖ Any local authority;
- ❖ Hospital site;
- ❖ University or college

(Based in or operating in Tayside and Central Scotland Partnership area)

Please note, a single organisation must be nominated as the applicant; however, several projects can be applied for within that organisation.

Bids costing less than £1,000 will not require match funding; however bids in excess of £1,000 and up to £5,000 will normally require match funding of 50%. Applications received which are greater than this percentage will be considered for their merits and may receive higher levels of funding. The applicant will be responsible for securing the remaining 50% match funding which should include a contribution directly from the applicant and may not come wholly from another grant scheme. In kind contributions are welcome.

STGS applications are judged in the order they are received, on their own merits and on the extent to which they meet the objectives of the STGS and their contribution to Tactran's Travel Plan Strategy and Regional Transport Strategy aims and objectives. The key factors influencing a decision are the extent to which applications demonstrate;

- ❖ An effective Travel Plan has been completed and is in operation, or;
- ❖ An effective Travel Plan is actively being developed;
- ❖ A detailed travel survey has been carried out;
- ❖ Complementary control measures are planned or in place, and where;
- ❖ Innovation, environmental benefit and/or value for money are demonstrated by the organisation's policies towards travel;
- ❖ Clear staff and managerial commitment to travel planning;
- ❖ Clear and achievable targets for achieving sustainable travel usage.

Other factors taken into consideration include:

- ❖ If there are any existing planning requirements related to travel plans, or;
- ❖ The application supports other Tactran targets;
- ❖ If there is other grants/assistance available;
- ❖ The percentage of staff covered by the travel plan and its measures,
- ❖ The establishment and managerial sign off of best practice case studies, and;
- ❖ The availability of STGS budget.

Tactran aims to offer STGS awards to successful applicants within one month of receiving a completed application form, following a decision by an assessment panel consisting of representatives from Tactran Awarding Panel.

Awards are made based on the understanding that each application is an accurate and honest reflection of circumstances. STGS awards will be offered subject to certain conditions such a commitments to monitor use for a set period and guarantee that awarded grants are used solely for the purposes identified in successful proposal.

Award of a grant does not preclude further applications in the same or future years by the successful applicant, for example for a different proposal or for a proposal by a different section of the organisation. However in the event of competition for the scheme's resources, previous awards to the applicant will be taken into account as part of the assessment process. Grants will be allocated on a first come, first serve basis.

Tactran may use a successful applicant's scheme to promote the STGS and wider Tactran objectives. Successful applicants will ensure acknowledgement of the STGS is evident in all work relating to the scheme, clearly identifying the funding through the STGS and the Scottish Government. Grants will be payable up front, with recovery should conditions not be met.

Conditions:

- a. Any organisation (or individual section or department) may apply, but grants are not available to enable organisations to comply with conditions of planning permission or legal agreements which require them to implement such measures.*
- b. The grant may be used to pay for the costs of the materials, implementation of schemes, consultation, research and surveys, technical advice or training or any other initiative which demonstrates potential benefits to the Tactran area by achieving the objectives of the scheme.*
- c. Applications are particularly welcome from groups working together, but a nominated person must sign the application form on behalf of a lead organisation accepting the conditions of the Grant.*
- d. The application must supply adequate information to justify the scheme. This should include the potential benefit of the scheme and how the actual benefit will be measured.*
- e. Grants will be awarded on a monthly basis to the most worthy bids received by the date of a meeting of the Tactran awarding panel. The earlier the application is received, the greater is the likelihood of a successful bid.*
- f. Grants will be payable up front with Tactran recovering funding, should STGS conditions not be met.*
- g. Evidence required for audit purposes will include 3 quotes, invoices, orders and brief report of the scheme after it is implemented.*
- h. The applicant must demonstrate funding commitment from other sources within their own organisation.*
- i. The grant will normally be a maximum of 50% of the cost of the scheme, with higher bids being considered on their merits.*
- j. Bids costing less than £1,000 will not require match funding.*

- k. *The maximum grant normally available for any individual application will be £5,000; however higher applications will be considered for their merits .*
- l. *Grants are not mandatory and will be offered solely at the discretion of the Tactran awarding panel.*
- m. *A response will normally be given to each application within one month. Applicants should not make financial commitments until they have received a written offer of a grant.*
- n. *The applicant will be solely responsible for payment to contractors and any overrun of costs – Tactran and its constituent bodies cannot be held responsible for such eventualities.*
- o. *Tactran retains the right to carry out a post-implementation review of the effectiveness of any scheme carried out with grant support. Schemes which demonstrate a positive impact and provide evidence of best practice will be considered for future funding streams.*