

Travel plan management

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3.1 Who should be involved in developing and managing the travel plan?

NHS Trusts are complex organisations and it is essential to identify at an early stage those individuals who should be involved in managing the development and implementation of the travel plan. The initial stages of development are likely to require input from a wide range of departments and groups. However, once the plan is up and running it may be possible to reduce involvement of certain parties. More detail is provided in Section 3.3: Setting up a Steering Group.

Leadership of the travel plan needs to reside clearly with an identified senior individual, possibly with the support of a more junior member of staff. The decision to develop a Trust travel plan may be triggered by a variety of reasons and it is likely that this will govern the choice of the individual who will lead travel plan development. For instance:

- If a travel plan is required as a condition of planning permission, the lead manager in the project may also lead the travel plan process, or
- If it has been initiated through Improving Working Lives, the lead may come from the relevant board director, or
- Quite typically, the lead will come from Estates and Facilities and involve the Transport Manager, or
- It may be initiated by Human Resources.

3.2 Senior management support


Whilst the travel plan will only work if it has the support and commitment of members of staff, it also relies on the support of senior management to enable its existence. Different levels of senior management support will be needed for different reasons:



Who?	Why?	How?
Board	<p>A clear endorsement from the board will help to give the travel plan credibility and will make it easier for senior and other managers to allocate resources to it.</p>	<p>Initially, support for the concept of the plan is all that is needed, with further expressions of endorsement during the process.</p> <p>Once measures are introduced some board members should be seen to lead by example. For instance, a board director that cycles to work sets an excellent example for other staff.</p>
Board director or senior manager	<p>A single senior manager or, ideally, board director should be leading the travel plan.</p> <p>This gives focus to the project and conveys a clear message that the concept is being embedded in the Trust's organisational structure.</p> <p>The individual should also be senior enough to be able to influence senior colleagues where appropriate.</p>	<p>The individual should chair the Steering Group or, if a specific group is not established, sit on the relevant group.</p>
Senior management	<p>Support from senior management will ensure that progress will be made. Their support will be needed to:</p> <ul style="list-style-type: none"> • Secure staff time. • Secure budget allocations. • Take high level decisions, for example, to introduce changes in policy. • Drive the change in the corporate culture in relation to transport and travel. 	<p>The early stages of the travel plan are likely to be the most time consuming. Senior management will need to agree to staff allocating time to the travel plan and should be willing to identify budgets, as well as committing some of their own time to the process.</p> <p>They will need to show willingness to challenge the current way of doing things, to be flexible and to lead by example.</p>

Further information on senior management support and commitment can be found in Section 2.2 of *A Travel Plan Resources Pack for Employers*.

3.3 Setting up a Steering Group

It is recommended that development of the travel plan is overseen by a Steering Group, chaired by as senior a member of staff as possible, ideally a director. The remit of the group will be to progress the development of the plan and to ensure all relevant departments, groups and other organisations are involved where necessary. The Terms of Reference Sample (Appendix 3A ) covers typical activity of a Steering Group and can be amended to suit the needs of an individual Trust. The structure described in 3.4 suggests one approach to establishing a Steering Group. Examples of alternative approaches are provided in Section 3.5: Other approaches to steering the direction of the travel plan.

Some Trusts such as the Royal Brompton & Harefield NHS Trust, Moorfields Eye Hospital NHS Trust and University College London Hospitals NHS Trust have set up a specific Travel Plan Steering Group with senior management representation from a range of departments. In the case of University College London Hospitals, a representative from each of the sites covered by its Trust-wide ‘umbrella’ travel plan is also involved.

In the initial stages of travel plan development it is recommended that the Trust is as inclusive as possible and offers the opportunity to as many people as is practicable to participate in the group. This helps to raise awareness of the travel plan and if some individuals decide that continued attendance at Steering Group meetings is not appropriate, they can still receive minutes of meetings if desired.

3.4 Membership of the Steering Group

There should be senior representation from a range of departments and groups across the Trust, including clinical departments, as shown below:

Departments	Facilities	Human resources	Clinical departments	IT	Communications
Groups	Improving Working Lives	Unions	Environmental working groups		
Sites	All sites involved				
External organisations	Local authority travel plan officers	Other NHS Trusts	Transport for London		

Departments: Whilst the need to involve Facilities, HR and various clinical departments is clear, the communications and IT teams have very specific roles. Effective communication of the process and progress of the travel plan to all members of staff and also to patients, visitors and the wider community is an important factor in the ultimate success of the plan. (see Section 10: Marketing and Communication). The Communications Department should be represented at each meeting so that they fully understand the process and can advise on marketing and PR opportunities, for example, the date of the next Trust newsletter. The IT department may only need to be included at certain times, when there is a specific need for their input.

Groups: Some travel plan initiatives sit comfortably under the Improving Working Lives or Environmental Group umbrella and a good channel of communication between these groups and the Steering Group is essential to avoid duplication of effort and to maximise resources.

Unions (staff side) need to be involved from the start of the travel plan process and can play a critical role in encouraging participation in the travel plan and securing support for it amongst staff. Union representatives can also wear two 'hats', attending on behalf of their department as well as their members.

Further information on the important role unions can play can be found in section 2.10 of *A Travel Plan Resources Pack for Employers*.

There may be other groups within the Trust whose activities tie in well with the travel plan and who should therefore be kept

informed of travel plan progress, for example, groups involved in improving signage and way finding within the Trust.

Sites: In the case of multi-site travel plans there should be a representative from each site on the Steering Group. Where this is unworkable because the number of sites is too large, as in the case of Primary Care Trusts or Mental Health Trusts, alternative means need to be found to ensure sites are not 'forgotten'. Primary Care Trust sites are sometimes already divided into groups or 'localities' and one individual can represent a group, or an individual may attend wearing two hats; a clinical hat as well as representing the site where they are based. Central & North West London Mental Health NHS Trust, with its 80+ sites to be addressed by the travel plan, had a small group taking their travel plan forwards, undertaking liaison with managers and sites outside of Steering Group meetings. This approach has worked well. For Trusts which have just four or five larger sites covered by the travel plan, a specific Sub-Group for site representatives can be set up. This enables site co-ordinators to be brought up to speed with the travel plan process which would be difficult if they did not all meet together.

External organisations: It may not be necessary to involve external organisations in the initial stages of travel plan development. However, if the Trust developing the plan has large numbers of staff from another organisation based there, they should be involved. A common example would be a Mental Health Trust being represented on a Primary Care Trust's Steering Group.

Some London Boroughs will have an officer responsible for travel plan development in the area, who can provide advice and information on specific aspects of the travel plan and

suggest helpful contacts, such as other local organisations also involved in travel planning. They are also a useful link into the council and its various services and departments and it is recommended that the local authority's travel plan officer is contacted in the initial stages of travel plan development.

The involvement of Transport for London will only be necessary in certain instances, such as in relation to specific issues associated with implementation of measures.

3.5 Other approaches to steering the direction of the travel plan

Linking the travel plan to the agenda of existing working groups: Some Trusts already have a range of different Steering or Working Groups in place and are reluctant to increase this number further by setting up a specific group to take the travel plan forward. As a Travel Plan Group may have a similar membership or may complement the remit of an existing group, it makes sense to tap into the existing group. However, care must be taken to ensure the travel plan does not 'get lost' in the group's agenda. The Royal National Orthopaedic Hospital NHS Trust has discussed its travel plan at its Healthy Travel Group, whilst Great Ormond Street Hospital for Children NHS Trust has included the travel plan on the agenda of its Improving Working Lives Group and its Environmental Group.

Small 'lead group' that calls in senior managers as appropriate: Some sites have chosen to have a small group of two or three people taking the travel plan forward, involving appropriate senior managers at different stages in the process, for instance, to comment on the staff travel questionnaire. The London Ambulance Service has adopted this approach.

3.6 Frequency of meetings

In the early stages of travel plan development meetings need to be frequent, at least monthly, in order to maintain momentum and achieve progress milestones. Once implementation is underway and/ or a co-ordinator has been appointed, typically six to twelve months into the process, frequency can be reduced. This may also be a good time to review the membership or even the existence of the Group.

3.7 Disbanding the Steering Group

Once the travel plan has been established and there is less need to drive forward actions in a day-to-day sense, an existing management forum is probably able to take forward responsibility for the travel plan, as in the case of the Royal Marsden Hospital NHS Trust. The Royal Marsden, which is well into the process of travel plan implementation at its two hospitals in Chelsea and Sutton, had a small Working Group in place for the development of the travel plan but this has now ceased. The Deputy Director of Facilities, who is responsible for plan implementation, is pro-active in progressing travel plan initiatives, and takes these to the relevant standing committees for approval and/or discussion as required.

3.8 Sub-Groups

Whilst the Steering Group oversees the 'bigger picture' and drives the plan forward, it may be necessary to create Sub-Groups focusing on specific aspects of the travel plan. These would report to the main group and may only need to be created for a limited period of time and then disbanded when their work is complete. Groups falling into this category could include a Car Parking Policy Group.


Sub-Groups, which would continue once established, include those related to measures such as a Bicycle User Group (BUG).

3.9 The travel plan co-ordinator

It is important that an individual, the travel plan co-ordinator, is responsible for overseeing the development and implementation of the travel plan. This person could be appointed specifically to take on the travel plan role, either on a full-time or part-time basis dependent upon the nature and size of the Trust, or they could be an existing member of staff. However, if the person is an existing member of staff, it is essential that a dedicated number of hours are set aside each week for their work on the travel plan. The travel plan co-ordinator need not themselves be a senior person although they should report to, and have the support of, a senior manager.

The responsibilities of the co-ordinator will vary between organisations but generally the co-ordinator will:

- Be the first point of contact for employees wishing to find out more about travel plan initiatives.
- Operate or hold responsibility for initiatives, for instance, ensuring that public transport information disseminated to staff, patients and visitors is kept updated.
- Organise new initiatives, for example, installation of cycle racks.
- Motivate others.
- Co-ordinate partnership working.
- 'Champion the cause'.

An example of a job description and associated newspaper advertisement for a part-time travel plan co-ordinator for Wandsworth Primary Care Trust is provided in Appendix 3B . The Wandsworth Primary Care Trust post was advertised in *Local Transport Today* and *The Guardian*.

It may be that in cases where Trusts are located close to each other, appointment of a joint travel plan co-ordinator could be considered.

Further information about the role of the travel plan co-ordinator can be found in Section 2.3 of *A Travel Plan Resources Pack for Employers*. Appendix 2Bii of the resource pack includes an example of a job description for a 'Commuter Planning Manager' at Queen's Medical Centre, Nottingham.

3.10 Networks and Partnerships

Although a small number of mostly Acute Trusts have been leading the way in travel plan development in recent years, for most Trusts this is a new activity in which they have had to become involved. Involvement in networks or partnerships can bring benefits and save time and effort.

i) Networks

Travel plan networks are groups of organisations working together to facilitate easier travel by sustainable modes. Key benefits to Trusts of participating in a network include:

- Sharing experience, information, ideas and good practice.

- Making contact with colleagues with a view to working together in a specific project or partnership.
- Creating a critical mass with other Trusts to instigate or lobby for change.

Networks can operate in different ways, offering a range of services to members.

London NHS Travel Plan Forum: Transport for London initiated the creation of this Forum to bring together Trusts involved in developing and implementing travel plans. The Forum has made it possible for activities, challenges and progress in different Trusts to be shared and for representatives to strengthen relationships with neighbouring Trusts. Through the Forum, Trust representatives have also learnt about external agencies providing services relevant to the implementation of measures, such as car sharing or promoting cycling.

The Forum has also brought together representatives from the Department of Health, Strategic Health Authorities and the London Boroughs, enabling useful relationships to be established for the future.

How the Forum will evolve is up to the members and is dependent on resources available. Meetings, held three to four times a year, are seen as useful networking events but are time consuming to organise. Transport for London is developing a London Travel Plan website, which will have a dedicated NHS section. An email group specifically for NHS Trusts is also being considered as part of this.

Local Authority Groups: Some local authorities establish networking groups for employers in their area. The relevant local authority should be contacted to find out if such a group exists or is planned.

Thames Gateway London Partnership:

The Partnership occasionally organises meetings and events focusing on travel plan development and good practice. For further information contact: Darren Little, Travel Plan Co-ordinator, Thames Gateway London Partnership, telephone 020 8227 3943, darren.little@lbbd.gov.uk.

Further information on travel plan networks can be found in section 2.12 of *A Travel Plan Resources Pack for Employers* and in *Good Practice Guide 314: A guide on how to set up and run travel plan networks*, available from the Transport Energy Best Practice Programme.

Workplace Travel Plan Email Group:

This new group is open to anyone involved in developing travel plans and is currently used mainly by local authority travel plan officers. To subscribe to the group contact: Karen Hall, Seltrans Travel Plan Co-ordinator, telephone 020 8461 7472, karen.hall@bromley.gov.uk.

ii) Partnerships

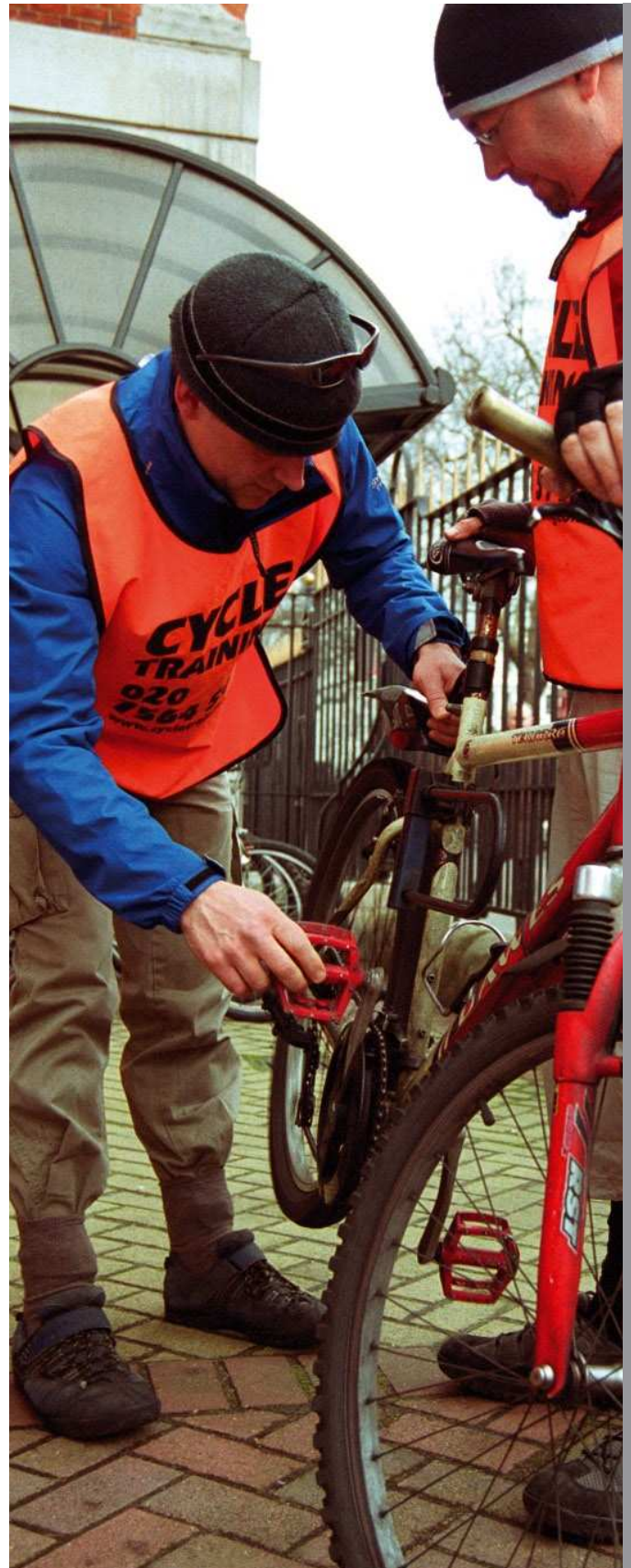
Typically, Partnerships involve only a small number of organisations and their small scale makes in-depth and focused discussion possible.

West London Hospitals Joint Working

Group: A group of Trusts which met at the London NHS Travel Plan Forum have begun working together as the 'West London Hospitals Joint Working Group'. The Trusts involved are the Central & North West London Mental Health NHS Trust, Royal Brompton and Harefield NHS Trust, Royal Marsden NHS Trust and St Mary's NHS Trust. The Group members have geographical connections and face similar challenges. They have identified a number of areas where they could work together including car sharing, cycle training and sharing a travel plan co-ordinator.

Local Authorities: Trusts can establish valuable relationships with their Borough travel plan officers, who will be able to offer advice on travel plan development and may even be able to provide resources to assist in the implementation of measures.

Local retailers: Retailers such as local cycle shops can often be persuaded to offer discounts or other benefits to customers who work for Trusts which have developed a travel plan. An agreement needs to be reached on the benefits on offer and then the offer from the retailer promoted to staff.



Examples of partnership working in travel plan development and implementation

The Royal Borough of Kensington and Chelsea offered free 'Dr Bike' bicycle maintenance sessions to organisations within the local authority area. **The Royal Marsden NHS Trust** took up the council's offer and ran a half-day maintenance session for staff at its Chelsea site in March 2004.

University College London Hospitals NHS Trust and the **London Borough of Camden** worked together to improve signage to University College Hospital. The local authority co-ordinated the design work for the signage, whilst the costs of implementation were split between Transport for London and the Trust.

Barts and The London NHS Trust worked in conjunction with the **City of London Police** to hold a cycle security marking session for staff in November 2003.

Evans Cycles operate a Privileged Discount Card scheme to Trusts and other organisations that demonstrate a commitment to promoting cycling to employees. The card entitles the bearer to 10% off any non-sale item at any Evans Cycles store (and via their mail order department). Evans Cycles fully manage the Privileged Discount Card scheme on behalf of the Trusts, at no cost to the Trust.

3.11 Resource Implications of Travel Plans

Besides allocating staff time for the travel plan sources of funding for the various activities, services and systems that may be implemented as the travel plan progresses will be required. The travel plan co-ordinator should be able to undertake a number of activities using existing internal corporate or departmental budgets, especially for communications and information campaigns. However other measures, such as infrastructure for cycling or software for car sharing, may require a specific budget source to be identified. Wherever the benefits of the travel plan can be quantified (for example, reduced staff turnover, reduced parking provision, etc) it should be possible to relate any internally-funded investment in the travel plan to these gains.

However sources of external funding should always be explored. Resources for specific types of measures may be available from the local authority (for example, cycling skills training), or from regional or central government. In addition the travel plan should take advantage of national campaigns such as Bike Week when considerable resources will be invested in promotion and free resources for event organisers are often available.

Tax

Since a Travel Plan may affect the conditions of employment of staff it is important to consider the current tax treatment of the various 'Green Travel' measures. Information on the tax implications of some of the measures that are often part of a travel plan are available from the Inland Revenue. Form IR176 in particular contains a lot of relevant information at www.inlandrevenue.gov.uk.

The Inland Revenue publish other leaflets that relate to travel plan issues and it is important to liaise with finance officers within the organisation to ensure that all tax and finance matters relating to the travel plan are fully understood.

Further information on the financial issues of travel plans can be found in section 8 of *A Travel Plan Resource Pack for Employers*.