

Travel Planning Toolkit

Toolkit User Guide

Version 1

July 2016



This document has been prepared to accompany the First Release version of the TfGM Travel Planning Toolkit for New Developments (July 2016)

[\[web address\]](#)

[Legal Disclaimer]



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1 Introduction

1.1 What is the TfGM Travel Planning Toolkit?

The TfGM Travel Planning Toolkit (or Toolkit ‘the toolkit’) is a web-based resource for designing, assessing and implementing Travel Plans across Greater Manchester.

The toolkit has been developed to:

- Provide guidance to anyone producing a workplace Travel Plan as part of the planning application process.
- Assist local authorities with reviewing Travel Plans submitted as part of the planning application process.
- Support anyone working at a new site with the necessary guidance and information about sustainable travel, allowing them to act upon a Travel Plan and encourage sustainable travel from the first day of occupation.

The toolkit facilitates the drafting, review, approval and publication of Travel Plans through an online system, working in parallel with established planning processes.

1.2 Purpose of this document

The purpose of this document is to outline the key functions of the toolkit and provide guidance on frequently asked questions. Many of the more specific help topics are addressed within the online toolkit itself.

- The key concepts of Travel Planning are provided by the toolkit website. Information on how to access this part of the website is included in **Section 0**.
- Background information on policy, planning and supporting documentation can also be found within the toolkit website. More details on accessing this part of the toolkit are included in **Section 6**.
- Technical guidance on the travel planning process is also provided as part of the toolkit. Instructions on how to access this guidance are included in **Sections 9 & 10**.

2 The Travel Planning Process

2.1 Introduction

The toolkit is intended to provide a consistent framework for completing Travel Plans in Greater Manchester. It will provide a new approach to the Travel Planning process that allows documents to be written and reviewed through a single online system. This section outlines how this new process will work, and who is responsible for maintaining it.

2.2 Types of Travel Plan

Travel Plans are typically completed for individual sites that are likely to generate traffic. These include:

- **Workplace Travel Plans** for employment sites and commuting traffic
- **Residential Travel Plans** for housing sites and all types of traffic
- **School Travel Plans** for education sites and school-run traffic
- **Station Travel Plans** for tram stops and/or train stations

The toolkit primarily caters towards Workplace Travel Plans, as these generate the greatest proportion of traffic across the Greater Manchester area. Other types of Travel Plan should still be referred directly to the local authority.

2.3 Workplace Travel Plans

Workplace Travel Plans typically outline a strategy for managing the number of people who drive to work on their own, thus cutting down on the number of vehicles on the road network around the site and reducing its overall impact.

A Workplace Travel Plan can be submitted at any time, including:

- **Before a planning application** while the feasibility of the site is still being explored
- **During a planning application** while other planning documentation (eg transport assessment) is being prepared

- **Following occupation of a site** to cater towards existing staff commuting patterns

The toolkit primarily caters towards Travel Plans being compiled before or during a planning application as part of the statutory planning process, although it does provide reference and guidance to those completing a Travel Plan following occupation of a site.

2.4 Travel Planning for New Developments

As part of the statutory planning process, Travel Plans are typically reviewed and approved by planning officers within the local authority responsible for processing planning applications in their area. These approved Travel Plans are then made public through the planning authority's website or the Planning Portal.

The toolkit is designed to mirror this process and manage the production and review of Travel Plans between applicants and the planning authority.

This process is summarised overleaf. It splits the process into pre-occupation and post-occupation stages and illustrates the step-by-step procedure for completing a Travel Plan. Each step is ordered into columns that represent actions taken by the Travel Plan applicant, planning authority or site occupier. The role of the toolkit at each stage of this process is outlined in the coloured boxes on the right.

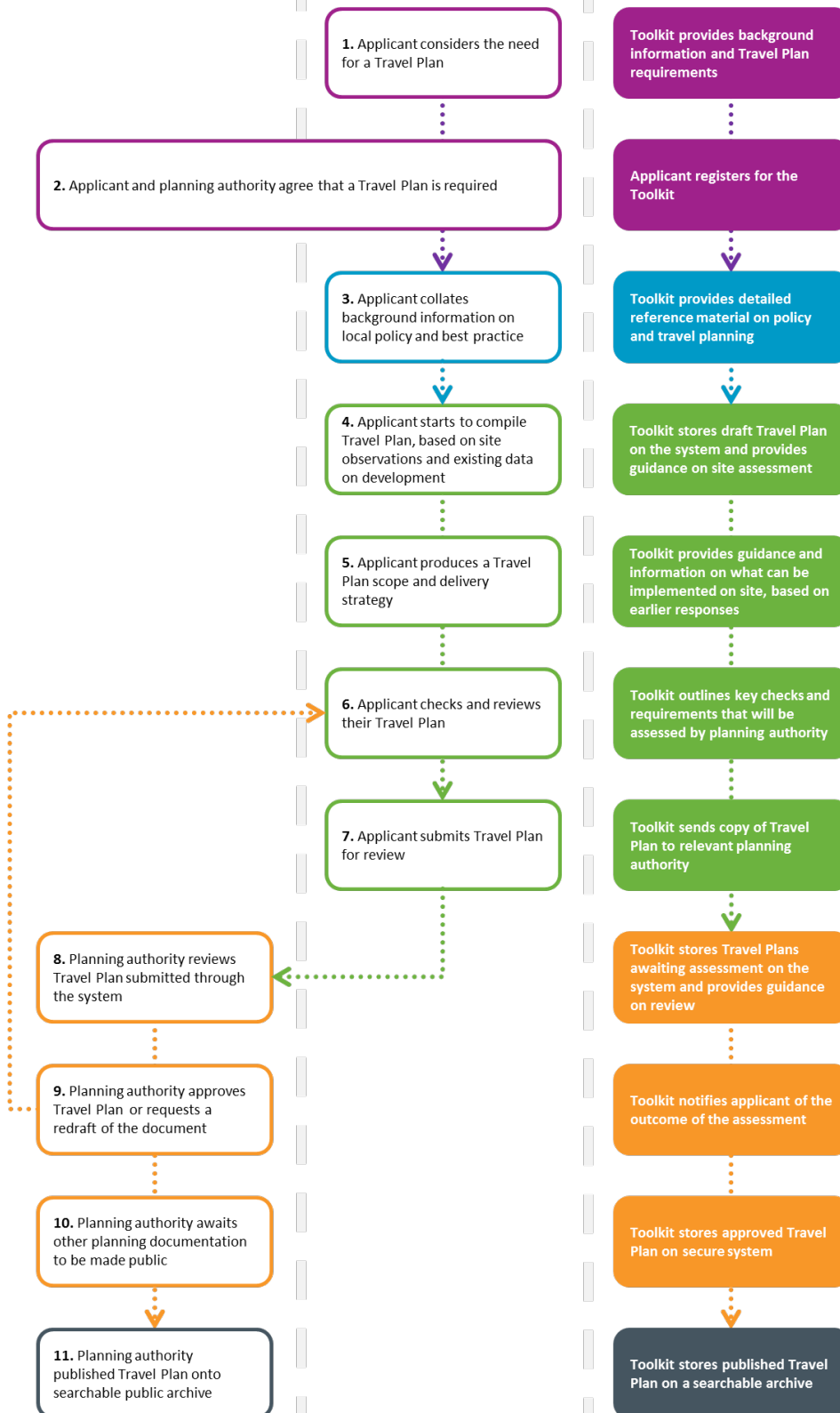
The rest of this document will detail how the toolkit fulfils its role at each stage of the process.

Pre-occupation

PLANNING AUTHORITY

APPLICANTS

TOOLKIT



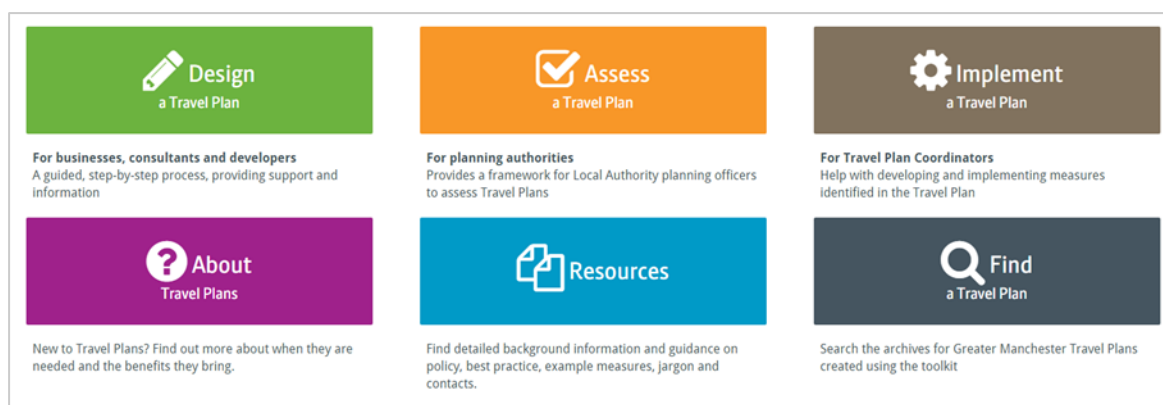
Post-occupation

SITE OCCUPIERS

3 Home Page

3.1 Where do I start?

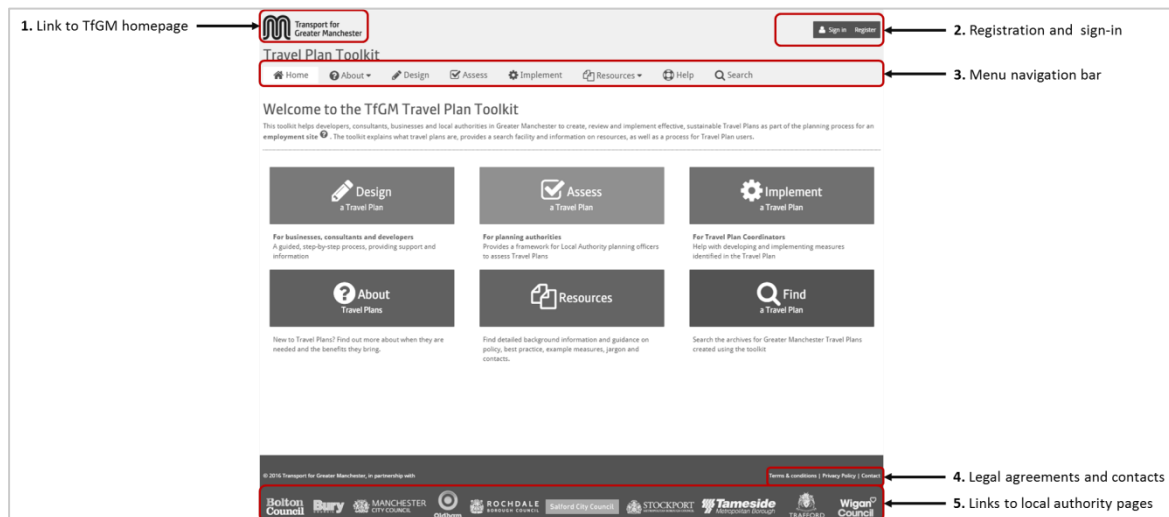
The homepage for the toolkit is divided into six key areas:



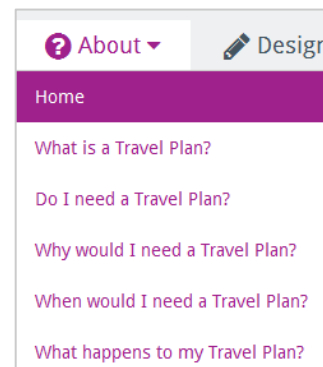
- Anybody who is new to travel planning, or is uncertain whether their site will qualify or benefit from a Travel Plan, should consult the **About** section.
- Those looking for background planning information or reference material about travel planning should access the **Resources** section.
- The toolkit will allow people to search for Travel Plans previously completed on this system. This will be available through the **Find** section.
- Anyone who has access to a previously completed Travel Plan and wants guidance on how to apply it on site should access the **Implement** section.
- Any individuals or companies who want to create and manage their own Travel Plans should click on the **Design** section (log in details required – see **Section 4**).
- Any local authorities who want to review and manage Travel Plans in their area should go to the **Assess** section (log in details required – see **Section 4**).

3.2 Navigation

In addition to the six key areas identified in the previous section, several other navigation features are available on both the home page and throughout the rest of the toolkit.



1. **Link to TfGM homepage** – links to the homepage of TfGM.
2. **Registration and sign-in** – provides links to your user account (if registered), as well as access to the registration and sign-in areas (see **Section 4**).
3. **Menu navigation bar** – includes links to the six key areas of the website, as well as access to the toolkit homepage and help documentation. Access to sub-menus is provided alongside headings with a down arrow (▼) where available (see right).
4. **Legal agreements and contacts** – provides access to the legal agreements underpinning the use of the toolkit and links to key contacts.
5. **Links to local authority pages** – The toolkit has been developed in partnership with all 10 local authorities in Greater Manchester. Links to each authority are provided at the bottom of the page.



4 Registration and sign-in

4.1 Introduction

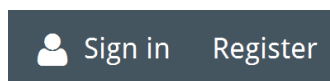
Many elements of the toolkit are available to anyone without the need to register or log in. These include the About section, Reference Area, Travel Plan Search and Implementation sections.

However, in order to be able to draft, submit or approve Travel Plans through the toolkit, a log-in will be required. This will give you access to your own user area known as 'My Travel Plans' where you can manage your Travel Plan drafts, submissions or approvals online.

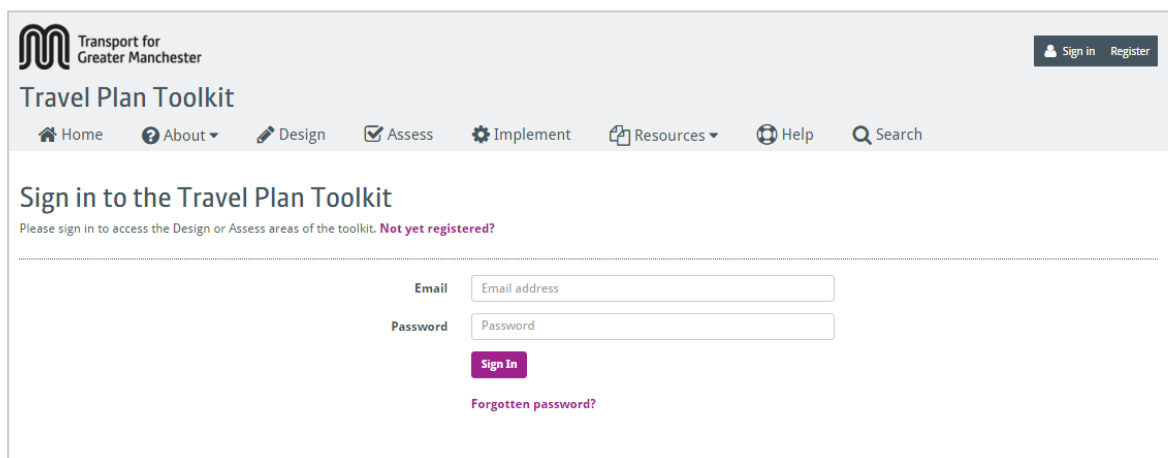
Registration will also allow the system to send you notifications and weekly updates on the progress of your Travel Plans.

4.2 Signing in

You will be able to sign in or register onto the toolkit system through the links on the top-right of the screen:



If you already have a user account, you will be able to sign in using your current email and password:

A screenshot of the "Sign in to the Travel Plan Toolkit" page. The page has a header with the "Transport for Greater Manchester" logo and navigation links: Home, About, Design, Assess, Implement, Resources, Help, and Search. The main content area is titled "Sign in to the Travel Plan Toolkit" and includes a sub-header "Please sign in to access the Design or Assess areas of the toolkit. Not yet registered?". Below this are input fields for "Email" (labeled "Email address") and "Password" (labeled "Password"). A purple "Sign In" button is positioned below the password field, and a link for "Forgotten password?" is at the bottom.

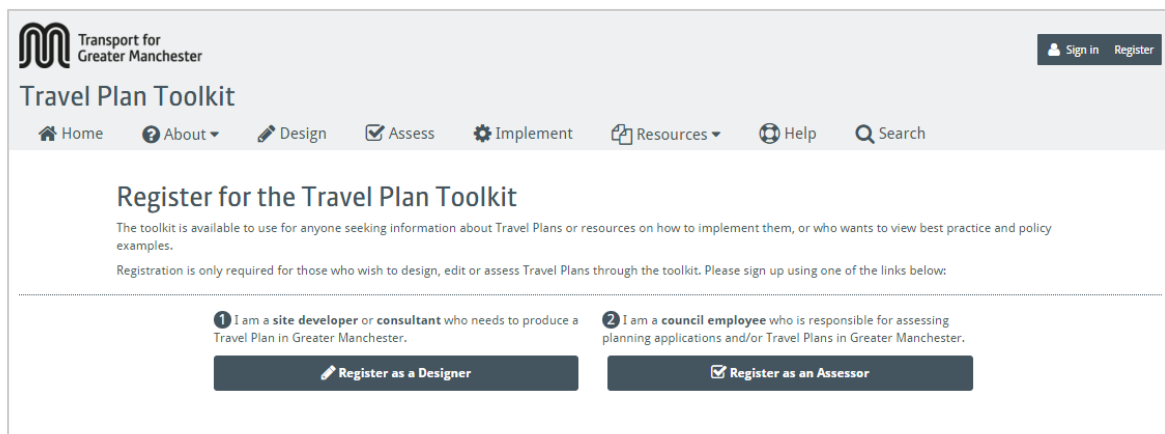
You will also be able to retrieve any forgotten passwords through your email sign-in details.

Should you not be registered on the system, a link is provided to allow you to create your own user account.

If you are not signed into the system, you will be prompted to do so if you wish to navigate beyond the opening screens of the **Design** or **Assess** sections.

4.3 Registration

Any new users who wish to access the Design or Assess sections of the website will need to register for a new account. There are two options for setting up a new user account:



1. **Register as a Designer** – Designers include anyone who wants to produce a Travel Plan for a development, such as developers, consultants or independent businesses.
2. **Register as an Assessor** – Assessors include anyone who is responsible for checking and reviewing Travel Plans from a local authority perspective as part of the wider development planning process. These can include planning officers or sustainable travel officers working within local authorities across Greater Manchester.

Upon choosing a registration option, you will be asked to provide some basic contact information (name, email, employer) and set up a password.

You will be required to agree to the terms and conditions of the toolkit as part of your registration.

Anybody registering as a designer will receive an automated verification e-mail in order to confirm their email address and contact details are legitimate. Following on from verification, you will be able to access the Design section of the toolkit.

Anybody registering as an assessor will be verified internally by TfGM before gaining access to the Assess section of the website. Only recognised or referenced planning authority employees will be permitted access to this part of the toolkit.

Important note – Do not register as an assessor if you are involved in the production of Travel Plans. Assessors are only intended to be planning authority employees who are permitted to comment on, approve and publish Travel Plans as part of the planning process.

This split registration process means that Travel Plan Designers will not be able to comment on, approve or publish their own Travel Plans. Similarly Travel Plan assessors will not be able to edit or change Travel Plans themselves.

The toolkit facilitates interaction between designers and assessors so that Travel Plan submissions are produced, assessed and if necessary redrafted by the appropriate party.

4.4 User areas

Once registered and logged in, you will be able to access your user account settings through the user icon:



This will allow you to access your Travel Plans, as well as offer options to change your password or log out. You will also be able to refresh your contact details.

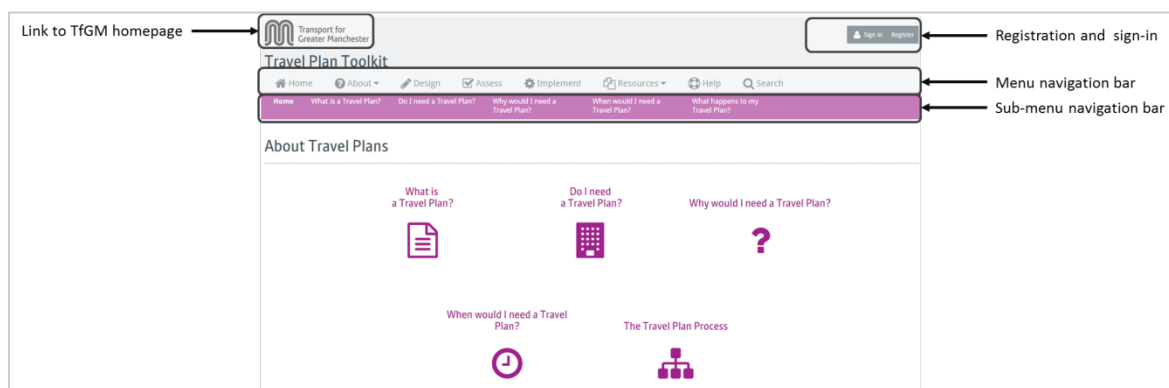
5 About Travel Plans

5.1 Introduction

This section of the website will be the initial destination for any users who are new to Travel Plans and wish to understand the requirements and benefits of the process. It also contains information on local authority thresholds for Travel Plans and site characteristics that warrant the production of a Travel Plan in most cases.

5.2 Navigation

The About section is formed of a main menu and several sub menus. It is possible to navigate between these sub-menus by either returning to the main menu, or by using the sub-menu navigation bar at the top of the screen.



The About section is divided into five sub-menus, each addressing the initial key questions commonly asked about Travel Planning:

- What is a Travel Plan?
- Do I need a Travel Plan?
- Why would I need a Travel Plan?
- When would I need a Travel Plan?
- What happens to my Travel Plan?

The section on ‘Do I Need a Travel Plan?’ is split into two parts, one which examines the outline thresholds for completing a Travel Plan and the other of which examines particular site characteristics.

The thresholds page contains an interactive map of the Greater Manchester area, allowing you to click across each of the 10 planning authorities and access their minimum site requirements for producing a Travel Plan.



To find out the minimum Travel Plan requirements in any authority, click on the relevant area illustrated in the map.

Some authorities will refer to other factors in considering whether a Travel Plan is necessary. These factors are listed on the site characteristics page.

Important note – The local authority thresholds and site characteristics should be treated as guidelines. The need to complete a Travel Plan or not should be determined through discussions with the planning authority.

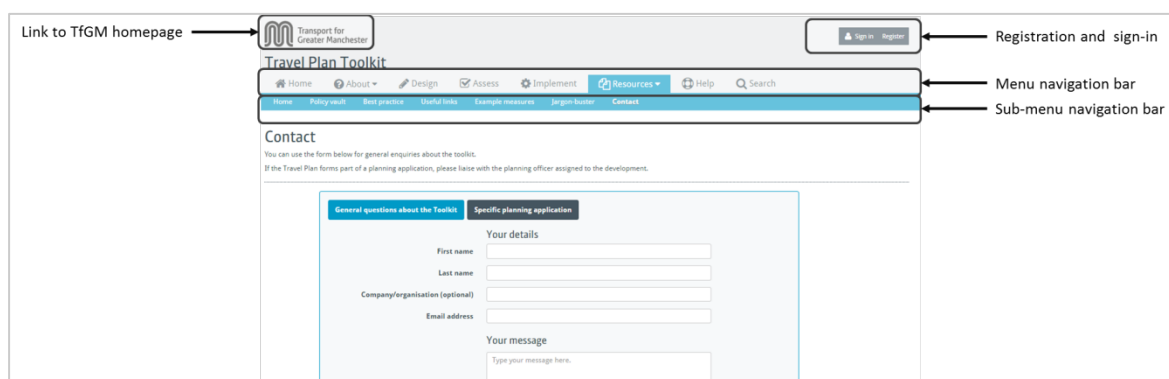
6 Resources

6.1 Introduction

This area of the website will act as a library for any supporting information relating to travel planning that can be used for reference while you are working on a Travel Plan.

6.2 Navigation

The Reference section is formed of a main menu and several sub menus. It is possible to navigate between these sub-menus by either returning to the main menu, or by using the sub-menu navigation bar at the top of the screen.



The Reference section is divided into six sub-menus, each relating to common reference material that can be used in travel planning:

- **Policy vault** – including local plans, supplementary planning documents, and other documentation relevant to each local authority
- **Best practice** – including examples of Travel Plans that have been commended by each authority.
- **Useful links** – such as TfGM services, or online data sources
- **Example measures** – listing of potential methods of improving sustainable travel on site.
- **Jargon buster** – list of terms commonly used in travel planning

- **Contact** – details for getting in touch with each local authority and TfGM

The policy vault includes all policy documentation relating to travel planning in Greater Manchester, and can be accessed via an interactive map.



To access the relevant policies for each local authority, click on the relevant area illustrated in the map. Policy and guidance documents from TfGM are available by clicking the TfGM text in the bottom right of the map.

The Contact section is split into two options: questions about the toolkit and questions about planning. Questions about the toolkit can relate to errors on the website or documentation. It is advised that users should examine the technical help throughout the website (see **Sections 9 and 10**) or view the About, Help or Reference sections before consulting TfGM on technical queries about travel planning.

All planning application queries should be addressed to the relevant local authority, based on the list of contacts provided. TfGM cannot respond to queries relating to individual planning applications on behalf of local authorities.

7 Find a Travel Plan

7.1 Introduction

One of the benefits of the toolkit is that as Travel Plans are added onto the toolkit system, an archive of documentation will be available to search and filter online. This will allow individuals who have recently occupied a new site to search for previously completed Travel Plans and start implementing them.

7.2 Navigation

The search page allows you to look for Travel Plans by:

- **Location:** via the map view window
- **Authorities:** Search for Travel Plans within a certain district eg Bolton, Bury, Manchester etc.
- **Development name:** Search for the name of your site or business eg 'Riverside Business Park', 'FreshMart'
- **Development postcode:** Search for the address of your site eg AA1 1AA

You will be able to combine search criteria (eg find all 'FreshMart' developments in Oldham) to narrow down your search.

Once you have entered your criteria click the Filter button to access the Travel Plan archive:



Release Note (Version 1) – Because the toolkit has been recently launched, the Search function may not yield results until Travel Plans are uploaded and approved on the system.

Archive

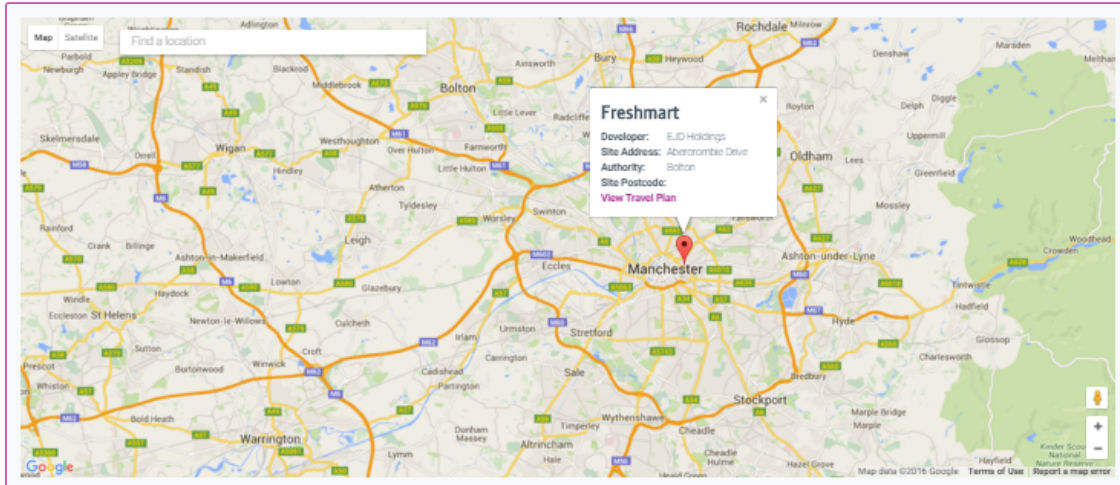
Available Travel Plans are shown on the map below. Click on a marker to display more information about a Travel Plan.

You are able to view all published Travel Plans.

You are also able to view your own Travel Plans that are currently in the design or assessment stage.

Map

1 Travel Plan is available to view.



Filters

Authorities	<input type="checkbox"/> Bolton
	<input type="checkbox"/> Bury
	<input type="checkbox"/> Manchester
	<input type="checkbox"/> Oldham
	<input type="checkbox"/> Rochdale
	<input type="checkbox"/> Salford
	<input type="checkbox"/> Stockport
	<input type="checkbox"/> Tameside
	<input type="checkbox"/> Trafford
	<input type="checkbox"/> Wigan
Development Name	<input type="text" value="Freshmart"/>
Developer Name	<input type="text" value="Developer name"/>
Site Postcode	<input type="text" value="M1 3BG"/>
	<input type="button" value="Filter"/>

The search results will appear on the once the search criteria are entered. You will be able to view, download or print copies of these Travel Plans by clicking on the link in the map view.

8 Implement a Travel Plan

8.1 Introduction

The Implementation section of the toolkit is intended to offer guidance for people working with previously completed Travel Plans. It includes links to supporting initiatives and outlines how a Travel Plan can be successfully maintained in the long term.

This section is mainly intended for those working with an existing Travel Plan, not those developing a new Travel Plan.

8.2 Navigation

From the homepage, anybody entering the Implementation section will see the Implementation main menu:

The screenshot shows the 'Implement a Travel Plan' page of the Transport for Greater Manchester Travel Plan Toolkit. The page has a header with the Transport for Greater Manchester logo and 'Travel Plan Toolkit' title. A navigation bar includes links for Home, About, Design, Assess, Implement (active), Resources, Help, and Search. Below the navigation bar, the page title 'Implement a Travel Plan' is displayed, followed by a subtitle: 'This section provides guidance and support for anyone implementing an existing Travel Plan.' The main content area is divided into two columns. The left column is titled 'Travel Plan Coordinator' and contains a paragraph stating that a Travel Plan Coordinator should be appointed to keep the Travel Plan up to date and ensure actions are carried out. Below this, it lists the responsibilities of the Travel Plan Coordinator, including taking ownership of the action plan, carrying out travel surveys, updating the Travel Plan, publicising key measures, being the point of contact for transport advice, liaising with senior management, and supplying Travel Plan-related information to the local authority. The right column features two purple boxes: 'About Travel Plans' and 'Find a Travel Plan'. The 'About Travel Plans' box includes a question mark icon and text stating: 'New to Travel Plans? Find out more about when they are needed and the benefits they bring.' The 'Find a Travel Plan' box includes a magnifying glass icon and text stating: 'Search the archives for Greater Manchester Travel Plans created using the toolkit'. At the bottom of the page, there is a 'Next: Background' button.

Transport for Greater Manchester

Travel Plan Toolkit

Home About Design Assess Implement Resources Help Search

Home Background Supporting initiatives Financing Monitoring Reviewing

Implement a Travel Plan

This section provides guidance and support for anyone implementing an existing Travel Plan.

Travel Plan Coordinator

A Travel Plan Coordinator should be appointed who is responsible for keeping the Travel Plan up to date and ensuring actions are carried out.

The Travel Plan Coordinator's responsibilities include:

- Taking ownership of the action plan to ensure it is implemented
- Carrying out travel surveys to keep up to date with current commuting patterns
- Updating the Travel Plan where necessary to reflect on site conditions and new initiatives
- Publicising key measures of the action plan and co-ordinating wider events such as cycle to work days.
- Being the point of contact within the organisation for anyone requiring transport advice or information.
- Liaising with senior management to secure support and funding for the plan.
- Supplying Travel Plan-related information to the local authority, such as monitoring reports and action plans, when required.

Next: Background

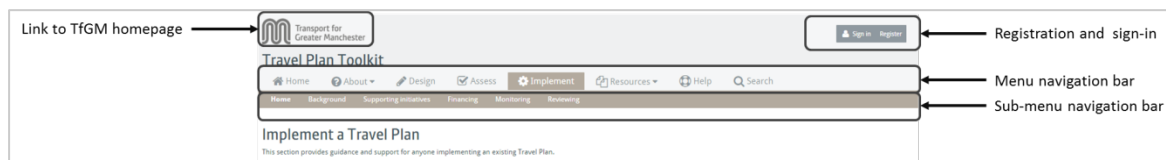
About Travel Plans

New to Travel Plans? Find out more about when they are needed and the benefits they bring.

Find a Travel Plan

Search the archives for Greater Manchester Travel Plans created using the toolkit

The Implementation section can be navigated via the sub-menu bar at the top of the screen:



Alternatively, users can click the 'Next' button to view each sub-menu sequentially.

This section of the website is intended to function as a resource for people who are not transport specialists, or experts in sustainability or travel planning. The main menu therefore provides a link to the 'About Travel Plans' section introduce Travel Plan Coordinators to the main concepts.

There is also a link to the Search function, allowing Travel Plan Coordinators to search for previously compiled Travel Plans on their site.

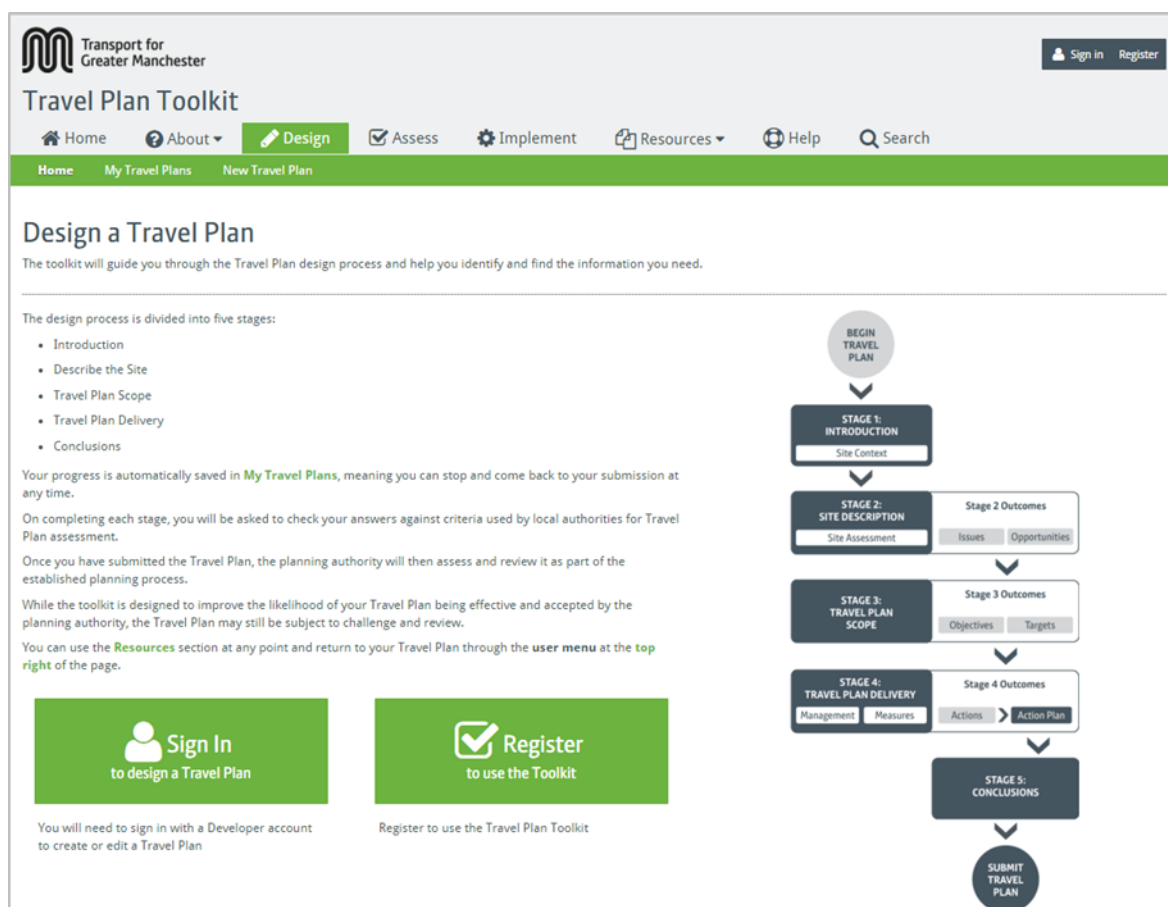
Throughout the Implementation section, links to the About section, Resources section and Help section are readily available.

9 Design a Travel Plan

9.1 Introduction

The process of producing and developing a Travel Plan is referred to as ‘designing’ and anyone involved in the production and development of Travel Plans (such as transport consultants, developers and independent businesses) is a “designer”, or “applicant”.

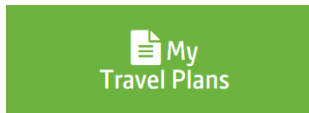
The purpose of this element of the toolkit is to provide designers with a standardised approach to designing Travel Plans; ensuring they are site specific, high quality and fit for purpose.



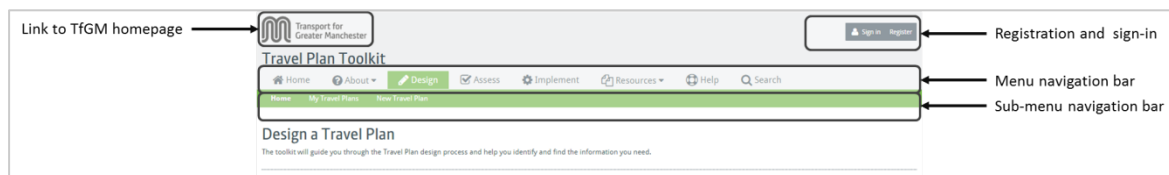
The main menu of the Design section outlines the process and offers the option to start a new Travel Plan, or access My Travel Plans. Both these options require a Designer log-in, as outlined in **Section 4**.

9.2 My Travel Plans: For Designers

My Travel Plans is the centralised archive for all Travel Plans you are progressing or have completed with your user account. You can navigate to My Travel Plans from the Design main menu:



Throughout the Design process, you will also be able to access My Travel Plans via the sub-menu navigation at the top of the page:



Within My Travel Plans, all your documents are listed in the main table view. You can sort these by name, authority, client, status or date modified. You can use this table view to navigate to different Travel Plans, or resume progress on existing Travel Plans.

Travel Plans are saved continuously as they are written up and progress through the system. This is highlighted in the 'Status' column. Travel Plan statuses include:

- **% complete [In Progress]:** Indicates Travel Plans that you are currently designing or updating, with the % completion shown in the green bar.
- **Draft submitted:** Indicates Travel Plans that you have submitted to the planning authority for review and are currently being assessed
- **Redraft requested:** Indicates Travel Plans that have been reviewed by the planning authority and have been sent back to you to redraft
- **Approved:** Indicates Travel Plans that have been approved by the planning authority and are awaiting publication into the public domain
- **Published:** Indicates Travel Plans that have been made public by the planning authority (for guidance on this process, see Section 10.2)

Transport for Greater Manchester

Designing: Selected Travel Plan

Travel Plan Toolkit

Home About Design Assess Implement Resources Help Search

Home My Travel Plans New Travel Plan Selected Travel Plan

My Travel Plans

[Applicant Name]
[Applicant Organisation]

Filter by Travel Plans containing "River"

#	Travel Plan	Authority	Developer	Assessor(s)	Status	Modified	Actions
1	Riverside Place	Midshire	Midshire Commerce		10% completed	15/03/15	Actions
2	Blue River Shopping Centre	Midshire	Midshire Commerce	Fred Biggs	Redraft requested	02/03/15	Actions
3	River Way Leisure Centre	Westshire			Approved	03/01/15	View/Download PDF

[+ Create New Travel Plan](#) Page: « 1 2 3 4 5 »

To the right of the main table view is a drop-down menu labelled "Actions". From this menu, you will be able to carry out a number of functions on 'in progress' or 'redraft requested' documents. These functions will be unavailable once a Travel Plan has been approved by the planning authority, or is undergoing assessment:

- **Edit Travel Plan:** Edit an existing Travel Plan.
- **Submit/Re-submit Travel Plan:** Takes you to the final stage of the Design process.
- **Display Draft Travel Plan:** Links to a printable copy of your Travel Plan
- **Email Travel Plan:** Attaches PDF copy of your Travel Plan to an email.
- **Print Travel Plan:** Prints off a paper copy of your Travel Plan.
- **Delete Travel Plan:** Removes the Travel Plan from the system (only available for Travel Plans that are 'in progress').

You can use the final four functions to review or discuss your Travel Plan within your organisation or informally with the planning authority. Once the planning authority has received and assessed your Travel Plan, you will be able to carry out an additional action;

- **View Comments:** Only available once the planning authority has provided comments on the Travel Plan – allows you to see feedback from the Travel Plan assessors

Approved and published Travel Plans cannot be edited and can only be viewed on the system.

Important note – While it is possible to email and circulate Travel Plans prior to submission, client confidentiality and data sensitivity need to be considered. TfGM are not responsible for Travel Plans that are made public in error or otherwise through the use/misuse of the print/email functions.

You can also create a new Travel Plan by clicking the link at the bottom of the main table:

 [Create New Travel Plan](#)

9.3 Creating new Travel Plans

If you are commencing work on a new Travel Plan, you can either click the link on My Travel Plans, or on the sub-menu bar. You can also start a new Travel Plan from the Design main menu:



When starting a new Travel Plan, you are prompted to provide some basic site information that will form the basis of the document. This includes site name, the developer organisation and district.

If you represent a developer directly, you will be able to select the “My Organisation” button to carry over your user details.

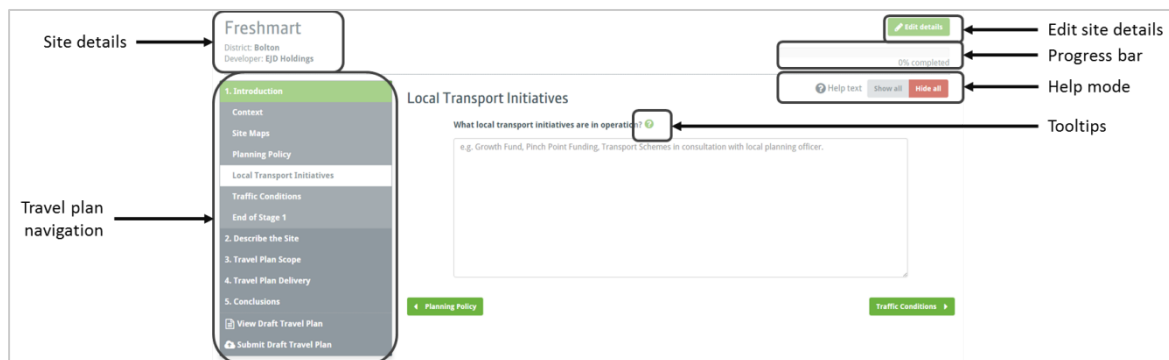
Once this information has been supplied, you will be able to start producing your Travel Plan.

9.4 Designing Travel Plans

Designing a Travel Plan is formed of a five inter-related stages, which must be progressed sequentially in order to produce a finalised document that can be reviewed by the planning authority:

1. **Introduction:** Supply basic information about the site
2. **Describe the site:** Supply more in-depth information about the site
3. **Travel Plan scope:** Identify core objectives and targets for the Travel Plan
4. **Travel Plan delivery:** Identify actions for implementing the Travel Plan
5. **Conclusions:** Summarise the outcomes of the Travel Plan

Each stage is formed of a series of prompts and questions regarding the site. These stages form the basis for navigating through your Travel Plan document.



The Travel Plan navigation bar on the left of the screen allows you to select each stage, bringing up a list of sub-stages beneath. You can navigate sequentially through each of these stages using the green buttons on the design page itself.

The site details you provided at the start of the process are transcribed into the page header on the top left, allowing you to identify which Travel Plan you are currently working on. These details can be edited at any time using the Edit Details button on the top right or the page.

Your progression through the Design process is monitored by the progress bar on the top right of the page.

Help Mode and Tooltips are also available throughout the process, as outlined in **Section 9.5**.

9.5 Accessing Help Mode

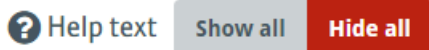
This Help document is intended to provide guidance on the main functions of the toolkit system, rather than technical guidance on the delivery of Travel Plans themselves.

Guidance on individual Travel Plan elements is provided via tooltips available on each page. Tooltips are specific to each question within the toolkit and can be accessed by clicking the Help icon:



For designers who are new to the Travel Planning process, it is possible to make all these tooltips visible throughout the process by activating the toolkit's Help mode.

Help mode is accessible by clicking 'on' or 'off' on the Help mode switch at the top right of the screen:



If the Help mode is switched off, it is still possible to view individual tooltips by clicking the help icons at any point during the process.

9.6 Checking your Travel Plan

The toolkit provides all the necessary guidance to complete a high-quality Travel Plan. While it cannot guarantee the approval of a Travel Plan by the planning authority, it performs checks at the end of each stage to ensure all the necessary information has been provided.

A number of inputs throughout the toolkit are identified as mandatory by the red star:



While it is possible to progress through the design process without completing these mandatory items, you will be reminded at the end of each stage if any mandatory items have been omitted. These reminders also provide links that allow you to navigate to the relevant missing section.

A final check is performed at the end of the design process, which summarises any missing items across the whole document. You will not be able to submit a Travel Plan to the planning authority via the toolkit system until all mandatory fields have been completed.


If all mandatory fields have been completed, you will be provided with a list of standard checks at the end of each section, based on the assessment questions against which each planning authority will be reviewing your Travel Plan. This also provides links to the relevant sections, allowing you to review key items as the Travel Plan is compiled.

9.7 Viewing and submitting your Travel Plan

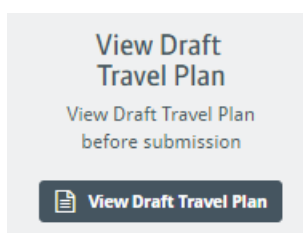
You will be able to produce a PDF version of your Travel Plan at any stage of the design process using the 'View Draft Travel Plan (PDF)' link on the left of the page. This compiles all of your responses into a PDF document.

At the end of the process, you will be able to submit a draft Travel Plan to the relevant planning authority. The toolkit will automatically send your Travel Plan to the local authority you specified at the start of the process (see Section 9.3). At this point, the toolkit offers you three options:

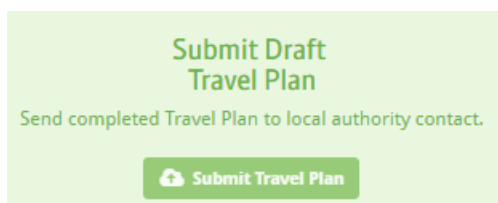
- Review any mandatory item omissions

Check incomplete sections 

- View Draft Travel Plan (PDF)



- Submit Draft Travel Plan



By clicking the Submit option, you will be sending on your Travel Plan to the planning authority for review and it will no longer be editable. The planning

authority can then approve the Travel Plan, at which point it progresses through the online system.

Alternatively, the planning authority may request a redraft and provide comments on why the initial submission was not successful. You will be able to revise the Travel Plan in this case, using the planning authority's comments as guidance.

10 Assess a Travel Plan

10.1 Introduction

The Assess section will only be fully accessible to planning officers working for local authorities within Greater Manchester. The purpose of this section is to provide a standardised method for appraising Travel Plans that have been submitted through the system.

Those responsible for reviewing Travel Plans are referred to as 'Assessors'.

The screenshot shows the 'Assess a Travel Plan' page of the Transport for Greater Manchester Travel Plan Toolkit. The page has a grey header with the TfGM logo and 'Transport for Greater Manchester' text. A dark blue button in the top right says 'Assessing: Selected Travel Plan' with a user icon. Below the header is a navigation bar with links: Home, About, Design, Assess (highlighted), Implement, Resources, Help, and Search. Below this is an orange sub-navigation bar with links: Home, My Travel Plans, and Selected Travel Plan. The main content area is titled 'Assess a Travel Plan'. It contains introductory text about the assessment framework, a list of five stages (Introduction, Describe the Site, Travel Plan Scope, Travel Plan Delivery, Conclusions), and instructions on how to use the toolkit. On the right side, there are two large orange buttons: 'My Travel Plans' and 'Register as an Assessor'. Below the 'Register as an Assessor' button is a link: 'Contact TfGM to set up an Assessor account'.

The main menu of the Assess section outlines the review process and offers the option to either register as an assessor or log into My Travel Plans as an assessor. Anyone using an unrecognised log-in will not be able to access this section fully, as all potential assessors should undergo a verification process as outlined in **Section 4**.

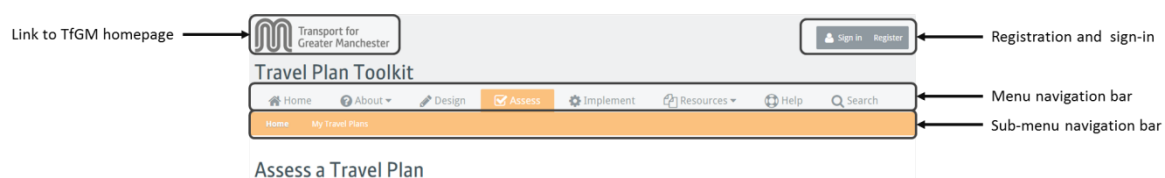
10.2 My Travel Plans: For Assessors

My Travel Plans is the centralised archive for all Travel Plans you are progressing on behalf of your planning authority. It allows you to view all Travel Plans submitted by applicants for sites within your district boundary.

You can navigate to My Travel Plans from the Assess main menu:



Throughout the Assess process, you will also be able to access My Travel Plans via the sub-menu navigation at the top of the page:






Within My Travel Plans, all your documents are listed in the main table view. Your Travel Plans will be organised into three separate areas, depending on how far they have progressed through the approval process. As an assessor, you are responsible for progressing Travel Plans through these areas:

- **Awaiting assessment:** Includes all Travel Plans that have been submitted by applicants in your area and either undergoing/awaiting a review, or have been sent back to the applicant for a redraft.
- **Approved (awaiting publication):** Includes all Travel Plans you have reviewed and approved. These Travel Plans will be stored in this area until you are ready to make them public.
- **Published:** Includes all Travel Plans you have designated to be placed in the public realm.

The My Travel Plans screen will always default to the Awaiting Assessment table view, although you have the option to switch between the above areas using the buttons at the top of the main table view.

My Travel Plans

Name of Assessor (Travel Plan Assessor)
Name of Local Authority

<div> Awaiting assessment Approved (awaiting publication) Public </div>				
Filter by <input type="text" value="Keyword(s)"/> <input type="button" value="Go"/>			Travel Plans containing "River" <input type="button" value="Show all"/>	
#	Travel Plan	Status	Modified	Actions
2	 Blue River Shopping Centre	Draft submitted	02/03/15	<input type="button" value="Actions"/>
1	 Riverside Place	<div><div></div></div> 40% assessed	15/03/15	<input type="button" value="Actions"/>
6	 River Way Business Centre	<div><div></div></div> 100% assessed	18/08/15	<input type="button" value="Actions"/>

Within any of the table views, you will be able to filter and sort Travel Plans by name, status or date modified. You can use this table view to navigate to different assessments, or resume work on in-progress assessments. Status messages appear alongside each Travel Plan. These include:

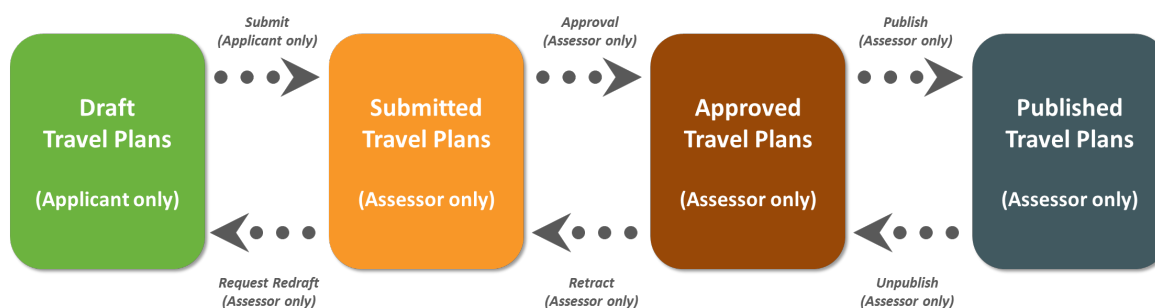
- Awaiting assessment view**
 - Draft submitted:** Indicates Travel Plans that have been added onto the system by applicants in your area and are awaiting review.
 - % Complete [in progress]:** Indicates Travel Plans that you are currently assessing, with the % completion shown in the green bar.
 - Re-draft requested:** Indicates Travel Plans that you have reviewed and sent back to the applicant to redraft
- Approved (awaiting publication) view:**
 - Approved:** Indicates Travel Plans that you have approved and are awaiting publication into the public domain
- Public view:**
 - Published:** Indicates Travel Plans that have been made public by the planning authority

These statuses will change as you provide comments on each Travel Plan and process them through the system.

10.3 Processing Travel Plans

As an assessor, you are responsible for ensuring Travel Plans are completed to the appropriate standard and placing them on the publicly accessible Travel Plan archive.

The previous section outlined three separate areas or document stores that are accessible to assessors: Awaiting assessment, Approved (awaiting publication) and Public. A fourth document store for Draft Travel Plans is only accessible to Applicants, as illustrated below:



You will be able to move Travel Plans between these document stores via the 'Actions' drop-down menu to the right of the status bar on My Travel Plans.

#	Travel Plan	Status	Modified	Actions
1	International Green Street	96% assessed	26/01/2016	Actions
2	phase 3 Lloyd street	Draft submitted	26/01/2016	<ul style="list-style-type: none"> Continue Assessment Display draft Travel Plan Email draft Travel Plan Print draft Travel Plan

From this menu, you will be able to carry out a number of functions on your Travel Plans, which will change as the Travel Plan progresses through the system.

At any stage in the process, you will be able to perform the following actions:

- **Display Assessment:** Produces an electronic copy of your comments relating to that Travel Plan

- **Print Assessment:** Prints a copy of your comments
- **Display Draft Travel Plan:** Produces an electronic copy of your Travel Plan.
- **Email Travel Plan:** Attaches PDF copy of your Travel Plan to an email
- **Print Travel Plan:** Prints off a paper copy of your Travel Plan

Other actions are specific to progressing Travel Plans through the system:

- **Awaiting assessment area**
 - **Start/Continue Assessment:** Provide comments on and review an existing Travel Plan
- **Approved (awaiting publication) area**
 - **Retract Travel Plan:** Withdraws any prior approval of a Travel Plan and notifies the original applicant that the Travel Plan requires updating (eg a pre-application Travel Plan requires updating for a full planning application). This moves the document back into the 'Awaiting Assessment' area and automatically assigns it a "Redraft requested" status
 - **Publish Travel Plan:** Places the Travel Plan in the public domain in the 'Public' area and the Travel Plan archive. This should only take place once all other planning documentation is publicly available on your authority's website or through the Planning Portal. As an assessor, you will be responsible for determining whether a document is ready for publication.

Important note – If you choose to publish a Travel Plan at this stage, ensure that the applicant is aware and approves of the document moving into the public domain. Due to potential sensitivities with some documents, it is recommended that Travel Plans are only published once the planning application has been made public and is accessible through your website or Planning Portal.

- **Public Area**

- **Unpublish Travel Plan:** If you feel a Travel Plan within your district has been published in error, or is no longer relevant to the site it describes, you will be able to unpublish it and place it back in the private 'Approved (awaiting publication)' area. As an assessor, you are responsible for ensuring all published documents for your planning authority are suitable for publication.

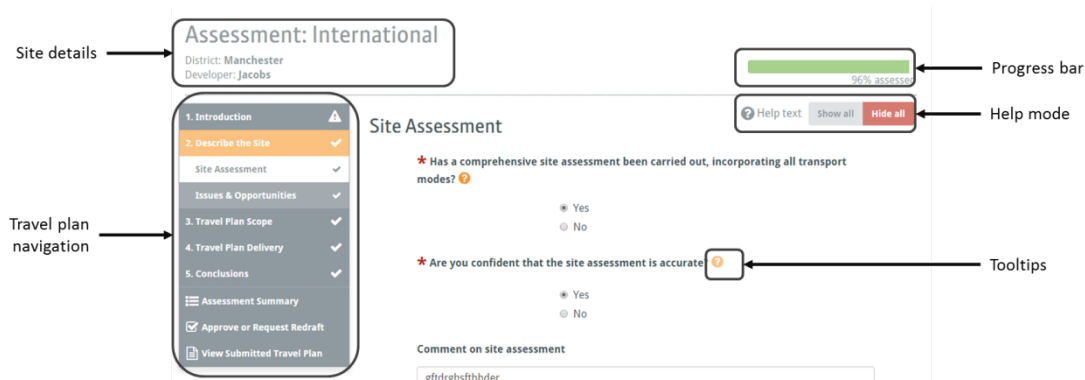
Important note – Whilst it is possible to email and circulate Travel Plans prior to submission, client confidentiality and data sensitivity need to be considered. TfGM are not responsible for Travel Plans that are made public in error or otherwise through the use/misuse of the print/email functions.

10.4 Assessing Travel Plans

The assessment process mirrors the Design process in that it is oriented around five inter-related stages:

1. **Introduction:** Supplies basic information about the site
2. **Describe the site:** Supplies more in-depth information about the site
3. **Travel Plan scope:** Identifies core objectives and targets for the Travel Plan
4. **Travel Plan delivery:** Identifies actions for implementing the Travel Plan
5. **Conclusions:** Summarises the outcomes of the Travel Plan

You will have access to either an electronic or paper copy of the applicant's Travel Plan, which will be organised into these five stages. The assessment and review process comprises a series of checks, prompts and questions regarding each stage, with opportunities to provide additional comments alongside each check. These five stages form the basis for navigating through your Travel Plan assessment.



The Travel Plan navigation bar on the left of the screen allows you to select each stage, bringing up a list of sub-stages beneath. You can navigate sequentially through each of these stages using the orange buttons on the assess page itself.

The key site details summarised at the start of the assessment process and are transcribed into the page header on the top left, allowing you to easily identify which Travel Plan you are currently working on.

Your progression through the assessment process is monitored by the progress bar on the top right of the page.

10.5 Accessing help mode

This Help document is intended to provide guidance on the main functions of the toolkit system, rather than technical guidance on the delivery of Travel Plans themselves.

Guidance on individual Travel Plan elements is provided via tooltips available on each page. Tooltips are specific to each question within the toolkit and can be brought up by clicking the help icon:



For assessors who are new to the Travel Planning process, it is possible to make all these tooltips visible throughout the process by activating the toolkit's Help mode.

Help mode is accessible by clicking 'on' or 'off' on the Help mode switch at the top right of the screen:

If the Help mode is switched off, it is still possible to view individual tooltips by clicking the help icons throughout the process.

10.6 Assessment summary

Following the completion of your assessment, you will be able to view a summary of your responses in a single list. This will also be provided to the applicant as part of your comments document.

The purpose of this summary is to enable you to see where you have highlighted potential shortcomings of the Travel Plan document and help you reach a decision on whether to approve it or send it back to the applicant for redrafting.

While the toolkit provides all the necessary guidance and summary information to thoroughly assess a Travel Plan, it does not set any minimum requirements for approval, nor do the responses indicate a pass or a fail for the Travel Planning element of the application.

The summary page will also highlight any sections you may have omitted during the assessment. Each of the core questions throughout the assessment process are identified as mandatory by the red star:



While it is possible to progress through the assessment process without completing these mandatory items, you will not be able to approve or request a redraft via the toolkit system until all mandatory fields have been completed.

10.7 Approving or requesting redrafts

You will be able to produce a PDF version of your comments on a Travel Plan at any stage of the design process using the 'View Assessment' link on the left of the page.

At the end of the process, the toolkit offers you two options:

- Request Redraft

A red rectangular button with a white left-pointing arrow icon and the text "Request Redraft" in white.

- Approve Travel Plan

A green rectangular button with a white checkmark icon and the text "Approve Travel Plan" in white.

By requesting a redraft, you will be sending the Travel Plan back to the applicant along with your comments in order for them to make changes and ensure that it meets your requirements. You will not be able to assess the Travel Plan any further until it has been re-submitted by the applicant.

By approving a Travel Plan, you are confirming the document is fit for purpose. The applicant will be notified of this, along with any comments you made throughout the assessment.

Clicking this will automatically move the Travel Plan into the 'Approved (awaiting publication)' area where it will remain until you decide to publish it. You will also have the option to publish and approve the Travel Plan at the same time, moving it straight into the 'Public' area.

Important note – If you choose to publish a Travel Plan at this stage, ensure that the applicant is aware and approves of the document moving into the public domain. Due to potential sensitivities with some documents, it is recommended that Travel Plans are only published once the planning application has been made public and is accessible through your website or Planning Portal.

As stated in previous sections, it is possible to revisit approved Travel Plans to either publish them or retract them for further updates.

11 Frequently asked questions

11.1 General

Who is meant to use the toolkit?

The toolkit caters to a number of audiences, who each effectively have their own section of the website dedicated to their requirements.

- *The **Design** section is intended for anyone producing a Travel Plan as part of the planning process. This includes developers and individual businesses who may be looking to submit a planning application. The Design section is also intended to be used by consultants and specialists to create Travel Plans on behalf of developers and businesses.*
- *The **Assess** section is intended for local authorities who are responsible for reviewing Travel Plans.*
- *The **Implement** section is intended to assist those responsible for putting Travel Plans into action once they've been approved. This includes property managers, office managers or Travel Plan Coordinators.*
- *The **About**, **Resources** and **Find** sections are intended to be used by anyone connected with Travel Planning.*

I'm not a Travel Planning specialist – will I be able to use the toolkit?

- *The About section of the toolkit includes lots of information to help you understand the basic concepts of Travel Planning. There is also a jargon-buster within the Reference section. While you are writing your Travel Plan, tooltips and help are also available to give you guidance at each step of the process.*

Why is the local authority asking me to produce a Travel Plan?

- *Your site is either large enough to require a Travel Plan based on your council's thresholds, or your council has deemed a Travel Plan necessary because of conditions around your site. See the **About** section for more details on why you need a Travel Plan.*

How will my site benefit from having a Travel Plan?

*The benefits of Travel Planning are outlined in the **About** section.*

What am I committing to by completing a Travel Plan? Will it cost me money?

Completing a Travel Plan will set you up with a number of actions that are specific to your site. Resource support is available from the Business Travel team [business.travel@tfgm.com] to help implement your Travel Plan.

I'm not sure where to start in terms of making my site more sustainable – where should I begin?

*The toolkit will assist in identifying issues and opportunities on the site as part of the **Design** process. This will help you to identify sustainable initiatives to implement on the site. You can also consult TfGM's guidance document on [Transport for Sustainable Communities](#).*

I'm an experienced Travel Planner and have my own templates for completing Travel Plans. Do I need to use the toolkit?

The toolkit has been developed by TfGM in partnership with each of the ten local authorities in Greater Manchester. It incorporates numerous features that will assist you with the production of Travel Plans and allows you to check your document in line with a standardised assessment framework agreed with each of the districts. The process will provide an efficient and coordinated approach to producing a Travel Plan.

11.2 Registration and log-in

Do I need a log-in?

You can access most of the reference material on the site (About, Resources, Find and Implement) without needing a log-in. However, if you are involved in the production or review of Travel Plans a log-in will be required.

Why do I need a log-in?

A log-in is required for you to access your own personalised area of the website, where you can view any Travel Plans you are working on. It also allows the toolkit to notify you of any updates to your Travel Plan.

What happens if I forget my password?

You will be able to request a new password via the email address you used for your user account.

What's the difference between an applicant and an assessor?

*Applicants include anyone responsible for producing a Travel Plan that will be reviewed by the local authority. These can include businesses, developers and consultants. An applicant will be able to access the **Design** section of the site.*

*Assessors include anyone responsible for reviewing a Travel Plan on behalf of the planning authority. An assessor will be able to view the **Assess** section of the site.*

Why are assessor accounts subject to validation by TfGM?

Assessors are responsible for progressing Travel Plans from initial drafts, through the review process and into the approval and publication stages. Because of the level of responsibility associated with being an assessor, TfGM will independently validate any applications to become an assessor.

Can I sign up to be an assessor to check the Travel Plans coming out of my organisation?

Assessors can only be representatives of one of the ten planning authorities around Greater Manchester. You can print or email draft Travel Plans for checking and auditing purposes internally before submitting them to the local authority.

11.3 About Travel Plans

Are the local authority thresholds enforced rigidly?

The thresholds are mainly intended for guidance purposes only and should be viewed alongside the site characteristics page to determine whether a Travel Plan is required for your site.

I think my site meets some of the site characteristics, but is under the local authority thresholds. Do I still need a Travel Plan?

You will need to confirm this in discussions with your planning authority.

My site has only just started pre-application discussions. Is it too soon to complete a Travel Plan?

It is never too soon to start a Travel Plan. By completing a pre-application Travel Plan, you may be able to identify features of your development that could be enhanced as the design and layout of the site progresses.

I've just found out that my site needs a Travel Plan, although it is really late in the development planning process. Will my Travel Plan be valid if it is submitted this late?

This will need to be discussed with the planning officer, based on deadlines agreed with the planning authority.

I'm currently occupying a site and think it would benefit from a Travel Plan. Can I complete one using the toolkit?

The toolkit is set up to assist with Travel Plans that need to be reviewed by planning authorities as part of the statutory development planning process.

*If you are already working on an occupied site, you can complete a voluntary Travel Plan using the guidance in the **Implementation** section. Support is available through the Business Travel team at TfGM [business.travel@tfgm.com]*

11.4 Resources

How up-to-date is the policy in the Policy Vault?

TfGM regularly liaise with the Greater Manchester planning authorities to ensure that policy and guidance are kept up to date. Any policies emerging from TfGM are also provided here. It is recommended that you confirm that all policies in the toolkit are up to date with your planning officer.

How were the Best Practice examples decided upon?

The best practice examples were initially chosen following consultation with the Greater Manchester authorities. These will initially be formed of examples produced prior to the toolkit going online, but will gradually be updated to reflect examples produced through the toolkit.

Can I nominate one of my Travel Plans to be a best practice example?

TfGM administer the Best Practice page and will take recommendations from the planning authorities regarding documents hosted on the site. Please contact your planning authority if you think your Travel Plan warrants inclusion on this part of the website.

How appropriate and up-to-date are the contact details on the toolkit?

The contact details for the local authorities have been agreed in consultation with each of the relevant contacts across Greater Manchester and will be updated periodically in line with changes in personnel. The contact form for TfGM will link directly to the website administrators.

11.5 Find a Travel Plan

I can't see any Travel Plans on the archive yet.

Following the initial release of the toolkit, it will take time for Travel Plans to be created, checked and published on the system. The Travel Plan archive should grow as more documents are processed through the system.

I can't find my site on the Travel Plan archive, although I can see other similar ones through the search tool.

*Your Travel Plan may still be on another part of the system. Use the contact details for local authorities in the **Resources** section to contact your local council and find out if they can publish it on the system.*

If the Travel Plan for your site was not submitted through the toolkit, it may be retrievable from the local authority's planning website or the Planning Portal.

11.6 Implement a Travel Plan

I have downloaded the Travel Plan for my site, but I'm not sure where to start.

*If you are new to Travel Planning, you can find out all the basics by looking at the **About** section of the toolkit. The **Implementation** section should help you understand your role and all the support that is available to you.*

For independent advice on putting your Travel Plan into action, contact the Business Travel Advice team [business.travel@tfgm.com].

I couldn't find a copy of a Travel Plan for my site online, but would like to complete one – what should I do?

You are welcome to submit a voluntary Travel Plan to cater towards your site, but it is not advised you do this using the current toolkit setup as this forwards all applications to the planning authority.

*You can complete a voluntary Travel Plan using the guidance in the **Implementation** section. Support is available through the Business Travel Advice team at TfGM [business.travel@tfgm.com]*

I don't think the Travel Plan I've downloaded for my site is up-to-date or appropriate any more – can I produce an update?

Travel Plans are live documents and by nature evolve over time; you can start by identifying the features you can implement or easy wins from the existing Travel Plan before thinking about updating it.

Any Travel Plan you produce voluntarily can be completed independently, using guidance from the Implementation section and from the Business Travel Advice team [business.travel@tfgm.com]. You do not need to use the Design features of the toolkit for producing a voluntary Travel Plan.

I'm responsible for implementing the Travel Plan on my site - can I use the toolkit to complete my own Travel Plan?

The travel planning design features on the toolkit are intended for those submitting a Travel Plan through the statutory planning process. If you want to complete your own voluntary Travel Plan, you do not need to go through this process.

Instead, you can compile your own using guidance in the Implementation section and through consultation with our Business Travel team at TfGM [business.travel@tfgm.com]

What is the difference between designing and implementing a Travel Plan?

The main difference relates to whether an employment site is currently applying for planning permission or not. The Design section is intended to assist planning applicants through the Travel Planning process before the site is given planning permission.

The Implementation section is intended to assist anyone on how a Travel Plan can be managed day-to-day once a site has received planning permission and is currently in use. It does not include the same features as the Design section, as it assumes a Travel Plan is already in circulation following the planning process.

11.7 Design a Travel Plan

Do I need to respond to every single question in the toolkit?

The toolkit is intended help you to think about the sustainability of your site and put together an action plan that is site-specific – the questions allow you to consider a diverse range of circumstances. While not all of these will be relevant to your site, there are some mandatory questions that will require a response in order to allow you to submit Travel Plans onto the system. You can track your progress through the toolkit using the progress bar at the top of the Design screen.

I'm submitting a pre-application Travel Plan and don't know much site-specific information at this stage. Will my Travel Plan be accepted if I leave a lot of questions out?

The toolkit allows you to define your plan as part of a pre-application submission or a full planning application. This will allow the authority to review your Travel Plan effectively, taking into account your site's progress in the planning system.

Is there a word limit on any of the inputs?

Some inputs are designed to be entered as numbers or dates. For the larger text inputs there is no word limit, although it is advisable that responses are kept brief.

How much detail should I include on policy?

It is advisable to keep responses brief and relevant to your site in this section. It is no longer an expectation to include a detailed narrative of local policy.

Why does the toolkit ask for detailed information about the transport assessment – shouldn't that already be available?

Travel Plans should have strong links with the transport assessment and other commentaries on existing traffic conditions. The purpose of this section is to identify the traffic impact of your site so you can orientate targets for improvement around it.

I don't have access to a transport assessment. Will this harm my Travel Plan submission?

Failing to provide details from the transport assessment does not invalidate your Travel Plan. However, if you do not have access to a transport assessment you may be able to ask your planning authority to provide a copy if one exists.

Is it acceptable to use assumptions from Census data to derive traffic movements?

The suitability of data from the Neighbourhood Statistics site and Census Journey to Work data will be determined by the planning authority as part of their assessment, depending on the availability of a transport assessment and the quality of the traffic data available to you.

I don't know what land use has been agreed for my site yet – how do I fill in the land use information?

Inputs are available for 'mixed use' and 'mixed use employment' if you are uncertain.

I don't know what the occupation date for my site will be – how do I fill in the site occupation information?

Use assumptions regarding the opening year or opening month of the site by filling in '01' in the date/month fields you are uncertain of.

During the site assessment, can I identify items as issues and opportunities?

Yes, although it may help in the latter stages if you pick one or the other.

I'm not sure all these site assessment questions apply to me. Can I leave some out?

Yes, the purpose of the site assessment is to ensure all aspects of the site are considered, but not all inputs will be relevant to every site.

How many bus services can I include in my list of key routes?

Up to 10 services can be included, provided they tie in with the key movements to and from your site.

Will my Travel Plan not get approved if I identify too many ‘issues’ with the site?

Your Travel Plan could still be approved, even if you identify a lot of issues – the purpose of the issues and opportunities is to allow you to produce site specific objectives and targets, not to highlight inherent deficiencies with the site.

What is the difference between objectives and targets?

Objectives are high-level aspirations you have for your site, based on the issues and opportunities you’ve identified. Targets are designed to be more measurable and accountable. They should ultimately aim to fulfil each of the objectives.

Do I have to link in all my objectives into my targets?

No – there is flexibility within the toolkit to add as many or as few objectives to each target as necessary. However, linking objectives to targets helps demonstrate to the assessor that there is a thought process behind each target and assessors may flag up any incidences where there are unlinked targets or objectives.

How many objectives and targets should I set?

The objectives and targets should ideally be site-specific and linked into one another. A maximum of five objectives and five targets is advisable

Will adding new emails to the contacts section of the Management Strategy mean that extra email traffic will be generated for these people?

The contact details are intended to provide an audit trail should the planning authority have any questions about the site or the Travel Plan. If the Travel Plan is successfully implemented, then email contact should be minimal.

I think I answered some of the questions about the Management Strategy in previous sections. Do I need to fill them in again?

The Management Strategy is intended to act as an overall strategy for the entire development. Previous and subsequent questions on monitoring, finance etc are specific to individual targets or actions.

How many measures and actions should I select?

Measures and actions should be selected on the basis that they are suitable for the site and will help attain the Travel Plan targets. A maximum of 12 measures or actions should be suitable.

Do I have to link in all objectives and targets to all of my actions?

Objectives and targets are an important part of justifying the actions you propose in your Travel Plan. Adding these links demonstrates that each of the actions has been carefully considered and links in with the previous thought process around the site. An assessor may flag up any incidences where there are unlinked actions.

Why is the 'Submit Travel Plan' option greyed out?

You will not be able to submit a Travel Plan for assessment until all mandatory fields have been completed. You will be able to see how many of these remain to be done at the end of each stage and at the end of the process

What does my Travel Plan report look like if I don't complete all the questions?

If no text has been added on some questions, then no text will appear in the report and it will skip to the next section where text has been provided. No apparent gaps will appear in the report, although your planning authority will be checking to ensure certain information is provided.

I don't want my Travel Plan to be searchable until the planning application is in the public domain. Will the system keep this information secure?

Once a Travel Plan is submitted, it is stored in a secure document store that is only accessible to the applicant and to the authority responsible for reviewing it. If the Travel Plan is approved, it remains within a secure area until the planning authority publishes it. Publication should only take place once all other planning documentation is in the public domain

Can the planning authority change my Travel Plan without my input?

The planning authority can only make comments on the various sections of your Travel Plan and cannot directly edit any of your inputs. If the Travel Plan does not meet their requirements, the planning authority will request a redraft. This relays

any comments made on the Travel Plan to you and allows you to make appropriate changes to the document.

11.8 Assess a Travel Plan

I work for an organisation that produces Travel Plans and want to review a draft document. Why can't I use the Assess section to do this?

*The **Assess** section is only intended for planning authorities to formally review, comment on and approve or reject Travel Plans submitted via the system. You can print or email draft Travel Plans for checking and auditing purposes before submitting them to the authority.*

Can multiple reviewers input on the same Travel Plan?

In theory, if log-in details are shared amongst the planning team, then anybody can access the system and add their comments to the Travel Plan. The comments will appear under the name of the original reviewer, so it may be beneficial to identify yourself within the comments.

The Travel Plan can only be approved or rejected by whoever is logged in at the time, so please ensure there is consensus on a decision before approving or requesting a redraft.

I previously used my own checklist to review Travel Plans. Can I use this instead of the toolkit?

The assessment checklist has been devised by TfGM in partnership with the 10 Greater Manchester districts, drawing on existing checklists and best practice across the area. Applicants will be using this framework as a means to audit their own Travel Plans and consequently they will be produced to meet the requirements of this checklist. You will have the opportunity to highlight any issues pertinent to your own authority in the comment boxes throughout the assessment.

Is there a word limit on the comments I can provide?

No – although it is advisable to keep any comments constructive and identify key strengths or shortcomings of the relevant section.

I'm uncertain how the Travel Plan will be secured.

Typically, this is done through a planning condition, which can be selected in the first instance and backed up in the comments box in the Introduction section of the assessment.

I've said 'No' to a lot of these questions, but overall I'm happy to approve the Travel Plan – is this acceptable?

Ultimately, the decision to approve or request redrafts for Travel Plans rests with the planning authority, based on their own requirements and priorities.

I've said 'Yes' to a lot of these questions, but I'm still planning to request a redraft – is this acceptable?

Ultimately, the decision to approve or request redrafts for Travel Plans rests with the planning authority, based on their own requirements and priorities. You may need to provide justification for your decision to allow the applicant to produce a suitable redraft.

The applicant has stated that their Travel Plan is quite sensitive. Will this be made public once I've approved it?

Once approved, the Travel Plan will automatically be moved into a secure document store until you and the applicant agree to make it public. This generally coincides with the publication of all the associated planning documentation on either your planning website or the Planning Portal.

What is the difference between approving and publishing?

Approving a Travel Plan places it into a secure document store ready to be published to the wider public. It is advised that you do not publish Travel Plans immediately after approval, to allow time for other planning documentation to be collated and made public officially through your planning website or Planning Portal.

Can I approve and publish simultaneously?

Yes – but ensure the applicant is aware of this.

What happens if I retract a previously approved document? Do I need to retract it then request a redraft?

Retracting a document automatically requests a redraft from the original applicant.

I just published a document by mistake, can I remove it?

Yes – you can unpublish any Travel Plans within your district at any time.

12 Contact

For further queries and information about the toolkit, contact TfGM using the contact form within the **Resources** section.