



The *TravelWise- workplaces process- a new standard for designing and implementing workplace travel plans in the Auckland region*

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Abstract

"Auckland Regional Transport Authority (ARTA) is setting up partnerships with Auckland-based workplaces to implement travel plans. ARTA is offering workplaces a standard, quality assured "how to" guide (the TravelWise- workplaces process) and in return for following this process, organisations gain access to a suite of high-value travel plan tools eg travel surveys, rideshare software, personal journey planning services etc. ARTA is capturing transport data through the process and ensuring that travel plans in the Region meet their quality expectations and deliver results ie reduce solo car driving.

Although numerous international best practice guides, case studies and research reports exist, a comprehensive "how-to" guide is lacking. The TravelWise- workplaces process closes this gap. Opus worked closely with ARTA to develop the process, which combines an internationally recognised project management methodology (Project Management Institute) with a proven process for delivering successful travel plans. The Auckland region Sustainable Transport Plan sets the scene for a co-ordinated, controlled roll out of travel plans across the Auckland region. The high value tools make travel plans more affordable to workplaces, and the process (and associated training) is closing the skills gap, making travel plans more accessible.

The TravelWise- workplaces process is a step forward for the field of travel planning and will catalyse the delivery of travel plans in New Zealand. Auckland already has a world-leading walking school bus programme, the TravelWise- workplaces programme has the potential to follow suit."

Introduction

The Auckland region is the most populated and fastest growing region in New Zealand; it covers 6,546 square kilometres, houses over 1.3 million people, provides 600,000 jobs and is home to over 650,000 cars. Auckland has one of the highest levels of car ownership in the world and this, combined with dispersed land use patterns, rapid rates of growth and chronic under-investment in the transport network is causing traffic and congestion problems that are costing the region an estimated \$1 billion each year.

A key conclusion of Auckland's Regional Land Transport Strategy, and of transport strategies and studies worldwide, is that "building roads cannot, on its own, reduce traffic congestion or deliver a transport system that meets wider environmental and social goals."¹

Add to this the ever-increasing cost of fuel, a growing number of car trips, and the need to provide sustainable alternatives to car driving becomes paramount. Auckland Regional Transport Authority (ARTA) has a specific task to:

*"Plan, fund, develop and operate an integrated regional land transport system that contributes to an integrated, safe, responsive and sustainable transport solution for the Auckland region"*²

To meet the objectives of the Regional Land Transport Strategy ARTA has developed a Sustainable Transport Plan which comprises a range of travel demand management programmes. These include walking and cycling action plans, school travel plans and walking school buses, workplace travel plans and town

¹ Sustainable Transport Plan, 2006, Auckland Regional Transport Authority, p 5

² www.arta.co.nz, Auckland Regional Transport Authority, August 2006



centre travel plans. Each travel demand management programme aims to achieve targets set by Land Transport New Zealand.

The 2016 target set in the Regional Land Transport Strategy for the ARTA workplace travel plan programme is to:

“Achieve a reduction of 3,500 cars from the morning peak, by working with organisations totalling 90,000 employees.”³

A key means of achieving this target will be increasing the uptake of workplace travel plans across the Auckland region. ARTA states in its Sustainable Transport Plan that it:

“aims to complete 30 workplace travel plans [in the Auckland region] per year for the next 10 years.”⁴

A travel plan is:

A package of measures that aim to reduce the number of car journeys and provide people with greater transport choice.

The aim of a workplace travel plan is to increase the use of buses, trains, cycles and other sustainable transport options and reduce dependency on the car for commute and business journeys. Travel plans can also help to reduce, or eliminate unnecessary journeys. Workplace travel plans can address all aspects of an organisation’s transport-related activities and in addition to improving the management of commuting and business travel; they can also look at better ways of making and receiving deliveries and managing the fleet.

New Zealand has the advantage of entering the travel behaviour change field fairly late, and is benefiting from the lessons learned from numerous travel behaviour change programmes overseas. A review of the literature identified numerous best practice guides, case studies and research papers, but a detailed “how to” quality-assured process for designing and delivering a travel plan was missing.

In 2006, Opus worked closely with ARTA to close this gap by developing *TravelWise- workplaces* process. This process is a comprehensive package to guide workplaces in designing and implementing a workplace travel plan in the Auckland region. *TravelWise- workplaces* was officially launched in Auckland on 9 August 2006. This paper is about ARTA’s *TravelWise- workplaces* process.

The need for *TravelWise- workplaces*

ARTA saw an opportunity to encourage workplaces to implement travel plans by reducing the cost of delivering travel plans through the provision of high value “travel plan tools” such as a business case tool, online surveys (and analysis) as well as personal journey planning campaign, public transport information etc. Further tools, including rideshare software, are planned for 2007. Providing these tools not only makes travel plans cheaper to deliver, it also helps to ensure travel plans are of a certain quality. In addition, ARTA recognised that there was a significant skills gap in New Zealand in designing and implementing travel plans. The *TravelWise- workplaces* process was developed to help close this gap; the process is supported by training courses and networking opportunities.

To justify spend and secure future funding for the *TravelWise- workplaces* programme, ARTA needs to demonstrate to Land Transport New Zealand that travel plans are delivering results ie they are delivering the ARTA Sustainable Transport Plan objectives. To do this, ARTA needs to capture transport data (in the right format) from workplaces. *TravelWise- workplaces* includes a comprehensive monitoring and evaluation component.

³ Sustainable Transport Plan, 2006, Auckland Regional Transport Authority, p 38

⁴ Sustainable Transport Plan, 2006, Auckland Regional Transport Authority, p 38

Whilst the *TravelWise- workplaces* process will not change from travel plan to travel plan, the travel plans created by following the process will be unique and meet the needs of the organisation for which they have been designed.

A context diagram showing ARTA's role in workplace travel planning is shown in Figure 1.

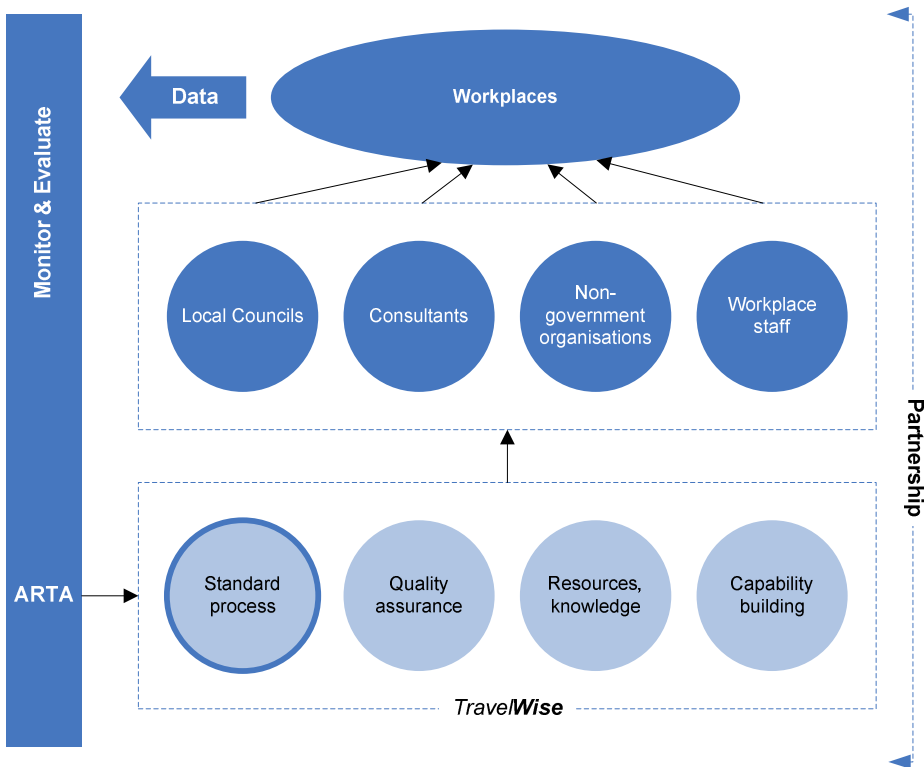


Figure 1 : Context diagram showing ARTA's role in workplace travel planning



The benefits of *TravelWise* partnerships

TravelWise- workplaces begins with the establishment of a voluntary partnership. ARTA forms partnerships with organisations, consultants and territorial local authorities that plan to deliver travel plans in line with the *TravelWise- workplaces* process. These partnerships embrace the principles of simplicity, integrity, delivering public good and affordability.

ARTA's commitment to the partnership is to provide a robust process (the *TravelWise- workplaces* process), a set of tools to make travel planning as easy and cost-effective as possible, and a variety of tools to assist in delivering the travel plan.

Internationally, standards in various disciplines have raised levels of quality, safety, reliability and efficiency and offer cost benefits. By providing a standard process for designing and implementing workplace travel plans, ARTA is able to:

- Facilitate learning and grow the skills base
- Increase the uptake of workplace travel plans across the region
- Become a centre of excellence for workplace travel planning
- Make designing and delivering travel plans more accessible
- Embed travel plans into business practice across the region

For the organisation, the commitment to the partnership involves appointing a project manager, designing and implementing the travel plan in line with the *TravelWise- workplaces* process, implementing and funding travel plan actions, agreeing to monitor and evaluate the performance of their travel plan, and putting in place a process to continuously improve the plan over time.

The benefit to an organisation of following the *TravelWise- workplaces* process is:

- Access to high value tools and quality products
- A more affordable travel plan
- Quality assurance- a process that enhances success
- Travel plans become more accessible

The *TravelWise- workplaces* process is currently voluntary.

***TravelWise- workplaces* Process Overview**

The *TravelWise- workplaces* process combines Project Management Institute methodology with travel plan knowledge and experience, and has much in common with the "Project Offices" found within many large organisations. The process is standardised and repeatable; promotes the use of quality tools and embeds travel plans into business practice. An overview of the *TravelWise- workplaces* process is shown in **Figure 2**.

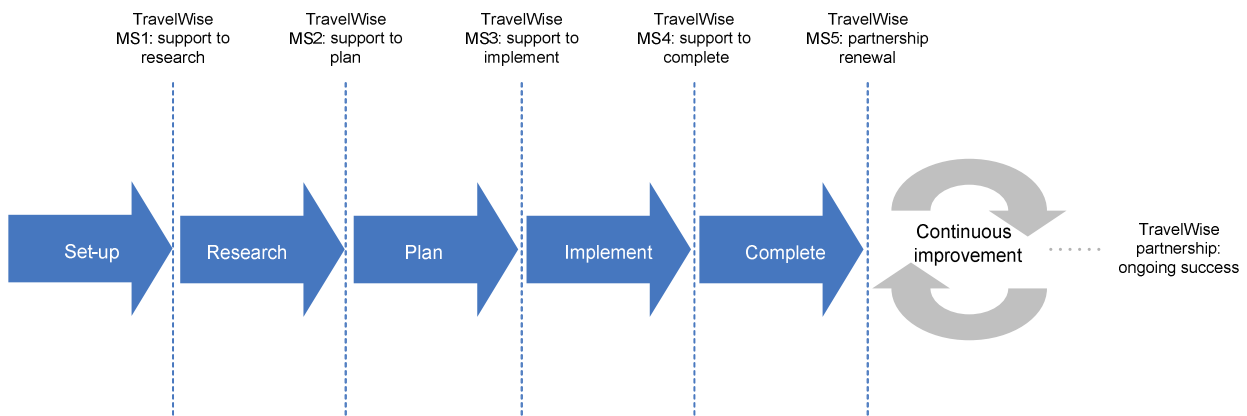


Figure 2 TravelWise- workplaces process overview

The process is divided into five phases: set-up; research; plan; implement and complete, after which the travel plan enters a continuous improvement cycle. The end of each phase is marked by a milestone.

For each phase, the *TravelWise- workplaces* process provides:

- Comprehensive guidance notes
- Travel plan tools
- Document templates and examples

At each milestone, organisations submit documents for review. ARTA performs a quality review on the documents to establish whether the travel plan is on track. When a travel plan meets all the milestone quality requirements, the organisation gains access to tools to help deliver the next phase. Set-up tools include: a business case tool, Research is supported by: an online staff travel survey and communication and consultation guidelines and during Implement, organisations can access: personal journey planning service and a travel webpage package. Continuous improvement is supported by a snapshot travel survey and a travel plan evaluation survey.

Figure 3 is an elaboration of **Figure 2** and describes briefly what happens within each phase and what ARTA is looking for at each milestone. A high level summary of each phase follows. For detailed information on the process and to view guidance notes, templates, examples and descriptions of the travel plan tools, visit www.travelwise/maxx.co.nz.

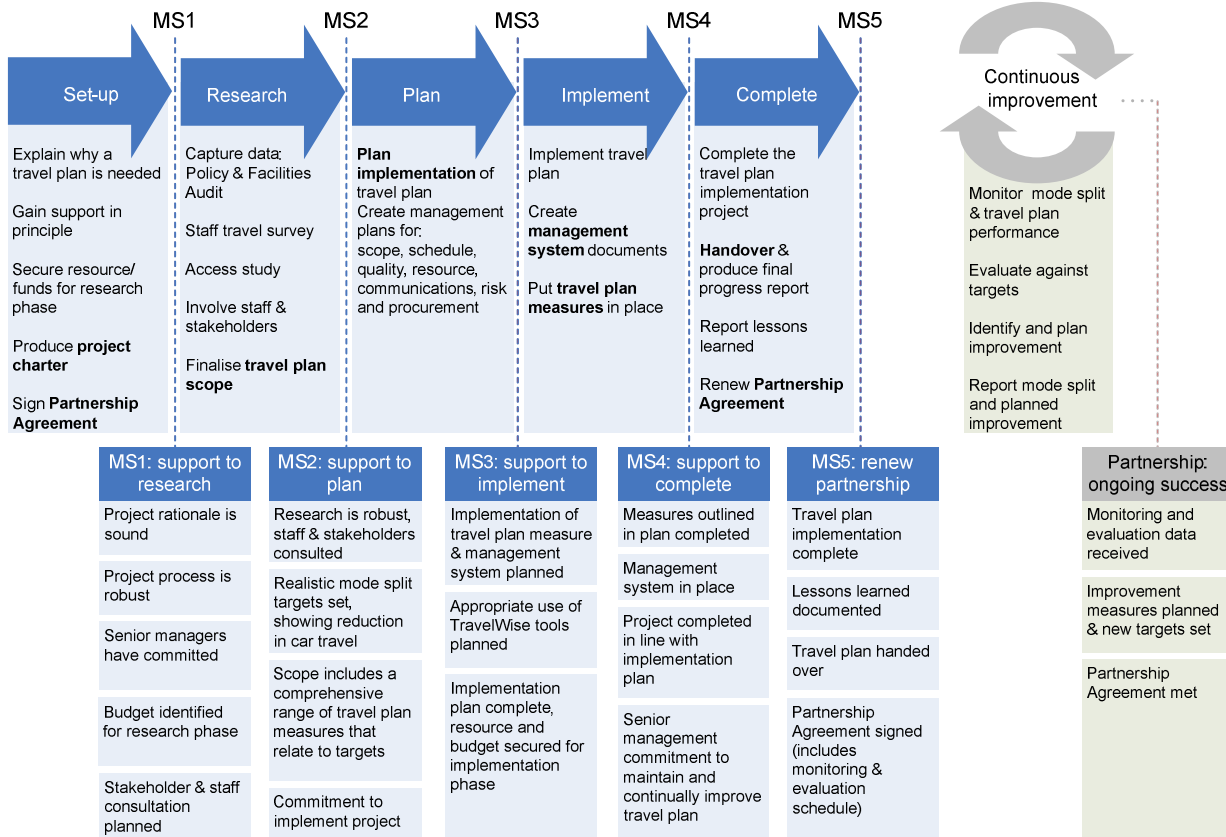
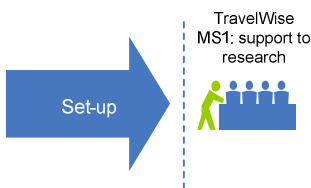


Figure 3 Overview of the TravelWise- workplaces process, with descriptions of each phase and milestone

Set up



The Set-up phase is the first set of actions that need to be done to get a travel plan off the ground and set up a TravelWise partnership. It takes place before the travel plan project starts and involves establishing a high level business case for the expected budget and resources. A TravelWise Champion is identified and either takes on the role of travel plan project manager or chooses to obtain external assistance for project management. During the Set-up phase, senior management authority, budget and resources are secured in order to start the travel plan project.

The deliverables of the set-up phase are:

- Senior management commitment
- Project Charter



- Research Phase Plan
- Partnership Agreement

The Travel Plan Steering Group is formed in this phase too.

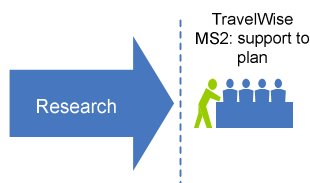
Milestone 1: support to research

This is the first quality assurance checkpoint. At Milestone 1, ARTA is checking that:

- Senior Management have committed to the project and that the intention is there to deliver a travel plan to reduce car trips
- The project process is robust, ie the Research Phase Plan is comprehensive and achievable and there is budget and resource available to complete the next phase.

ARTA also require all travel plans to follow an involvement approach, so they will check that staff and stakeholder consultation is planned into the Research phase.

Research



The Research phase is the second phase in the *TravelWise- workplaces* process. This phase includes a series of research tasks which will determine the base line against which the success of the travel plan can be measured, at the end of the Research phase, the travel plan scope is decided. The research tasks comprise:

- Reviewing facilities and policies
- Surveying staff travel behaviour
- Consulting staff and
- Understanding sustainable transport access

The results of this research, combined with experience at similar organisations and expert judgement, provides the information needed to scope the travel plan and set mode split targets.

The deliverables of the research phase are:

- Research findings (these do not need to be reported to ARTA)
- The Travel Plan Project Scope

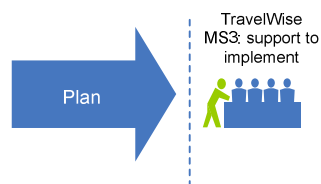
Milestone 2: support to plan

At Milestone 2, ARTA will review the Travel Plan Project Scope. They will check that the research is robust and that staff and stakeholders have been consulted.

The Scope Statement should include realistic mode split targets, showing a reduction in car travel and a comprehensive range of travel plan measures that will achieve these targets.

ARTA will also be looking for a commitment from the organisation to plan the project.

Plan

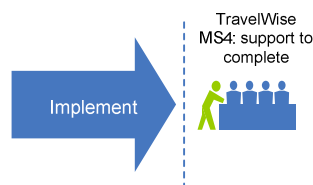


The Plan phase is the third phase in the process. The purpose of planning is to establish when and how the actions outlined in the Project Scope will be delivered as well as identifying how the Implement phase will be controlled. The deliverable of the planning phase is the Travel Plan Implementation Plan.

Milestone 3: support to implement

At Milestone 3, ARTA is checking that the implementation of travel plan measure and management system has been planned effectively, that appropriate use of TravelWise tools is planned into the project and that resource and budget has been secured for the Implement phase.

Implement



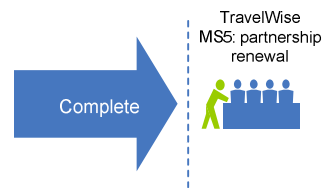
The Implement phase involves carrying out the actions described in the implementation plan, as well as developing the management systems (ie policies, procedures and documents) to support these. It involves authorising and completing the tasks, monitoring and controlling project progress and performance and regularly reporting progress (as outlined in the communication section of the Travel Plan Implementation Plan). The deliverables of this phase are the travel plan products and the management system and progress reports.

Milestone 4: support to complete

At Milestone 4, ARTA is checking that the travel plan policies, tools and actions outlined in implementation plan are in place and that there is a comprehensive travel plan management

system in place to manage the travel plan products and to monitor and evaluate performance. ARTA will check that the project has been completed in line with the implementation plan and that there is senior management commitment to maintain and continually improve the travel plan post-implementation.

Complete



After the Complete phase, the travel plan becomes part of day to day practice within the organisation. The purpose of the Complete phase is to bring the project to an orderly close and hand the travel plan over to the staff responsible for the travel plan after the project has been completed. Lessons learned are also documented in this phase.

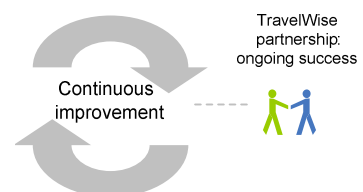
The deliverables of the Complete phase are:

- A Handover Report
- A Lessons Learned Report
- The Final Project Progress Report and
- A signed Partnership Agreement, which includes a monitoring and evaluation schedule

Milestone 5: Partnership renewal

At Milestone 5, ARTA will check that the travel plan implementation project is complete, that lessons learned have been documented and that the travel plan has been handed over to staff who will be responsible for it once continuous improvement begins. A Partnership Agreement is also signed at this stage which includes a monitoring and evaluation schedule.

Continuous improvement



The continuous improvement cycle has no end, it encompasses all activity relating to the travel plan after the project to implement it has been completed. By the time the continuous improvement cycle



begins, the travel plan will be part of day-to-day business practice and will have become part of the culture of the organisation.

The continuous improvement cycle will be different for every travel plan because each travel plan is unique. A travel plan owner will be responsible for managing the continuous improvement cycle and reporting to ARTA.

During continuous improvement, an organisation will monitor mode split and travel plan performance, evaluate performance against targets and identify and plan improvements. The organisation will report mode split and planned improvements to ARTA as set out in the Partnership Agreement, this will usually be an annual event.

TravelWise Partnership: ongoing success

At this point, ARTA will review the Partnership Agreement and results of monitoring and evaluation and any improvement actions that the organisation is planning.

Rolling out the process – theory into action

Over the past six months, the *TravelWise- workplaces* process has been trialled within several organisations. The feedback from these organisations and lessons learned has been used to refine the process and supporting components. On 9 August 2006 ARTA officially launched the *TravelWise- workplaces* programme.

At the time of the launch over twenty organisations were delivering *TravelWise* workplace travel plans in the Auckland region. The organisations vary in size and nature. These travel plans, and the stage they are at, are listed in Figure 4.

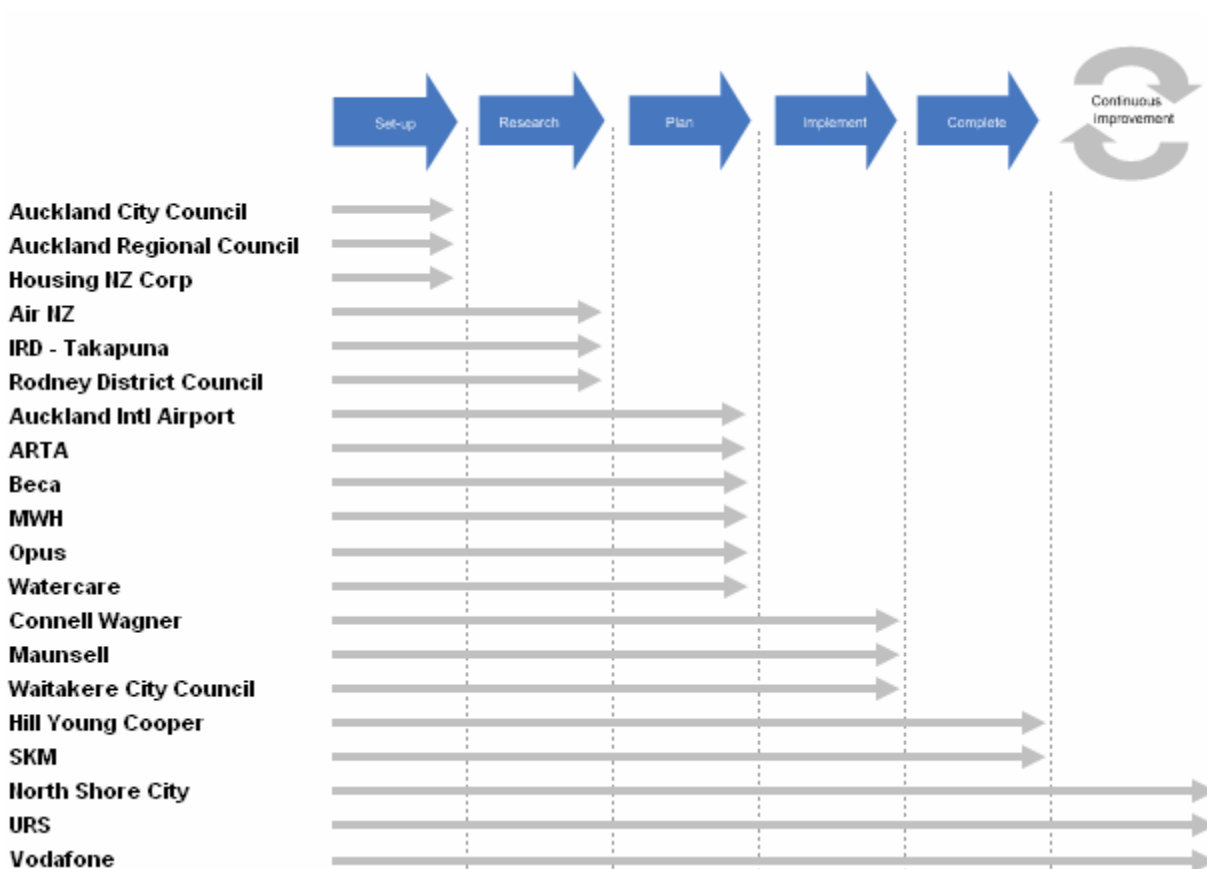


Figure 4 Travel plans currently in the *TravelWise- workplaces* process

Increasing the number of organisations in the *TravelWise- workplaces* program relies on increasing the number of individuals capable of delivering travel plans. ARTA has developed a training programme aimed to improve travel plan knowledge and skills of individuals within workplaces, partner agencies, local authorities and consultancies. The programme involves eight hours of self-study and a one-day workshop. The focus of the training is on the basic technical knowledge required for developing travel plans as well as understanding of the *TravelWise- workplaces* process.

Technical skills required to deliver travel plans include:

- An understanding of travel plans: their context; purpose and travel plan tools
- Creativity and innovation: travel plans are a new and growing discipline and new ways of influencing travel behaviour lie waiting to be discovered

The level of technical ability needed will vary with the size of the travel plan.



In addition, some general skills are needed. These include:

- Ability to influence an organisation
- Leadership
- Problem-solving
- Negotiating
- Communicating
- Holding and managing meetings and
- Managing stakeholder dialogue

ARTA has also started to establish a network for travel plan professionals and is hoping to create a network similar to the Association for Commuter Transport (UK). Future plans are for the establishment of an independent association of NZ Travel Plan Professionals.



Next steps

The *TravelWise- workplaces* process is the world's first publicly-available and comprehensive workplace travel plan process. As this new process matures, and as feedback and lessons learned are reported by users, ARTA will be able to improve and refine the process further.

The process has been successful in attracting workplaces to develop travel plans on a voluntary basis. Each workplace has chosen to develop a travel plan for its own unique reason but the patterns that are being established in the Auckland region identify key drivers such as: relocation, a variety of parking problems, the health and well being of staff and corporate sustainability.

The process is already being piloted with two large tertiary institutions, this demonstrates its flexibility. The process is able to be adapted to suit the complex research needs of such unique institutions. The process will soon be trialled for some hospital (health board) travel plans.

ARTA is already working on the next generation of tools to add to the *TravelWise- workplaces* programme. Two exciting new projects are underway to add new tools, these are:

- 1 Rideshare software
- 2 Establishing a suite of incentives and sponsorship deals to offer workplaces discounts on products, which support sustainable transport modes such as cycle and walking gear and portable audio equipment

The future expansion of the *TravelWise- workplaces* program means looking for new delivery partners. In the Auckland region this means strengthening the relationships with Local Authorities and establishing partners with existing business associations. Future opportunities include supporting the establishment of Traffic Management Associations (TMA's) and furthering the uptake of travel plans through these associations.

Next steps for *TravelWise- workplaces* are to put in place a comprehensive database to host all the valuable information that is collected through the process and to enhance the evaluation and monitoring components of the process.

A wealth of information is being collected through the *TravelWise- workplaces* programme, this presents a huge opportunity to share knowledge, ARTA could consider creating an online library of travel plan documents volunteered by organisations taking part in the programme. The *TravelWise- workplaces* programme captures a large amount of commuting data and is likely to attract the attention of travel behaviour change researchers internationally.

Auckland already has a world-leading walking school bus programme, the *TravelWise- workplaces* programme has the potential to follow suit.