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# Workplace Travel Plans
## Guidance for Canadian Employers

Canada

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Prepared by

**ACT Canada**
and
**Noxon Associates Limited**

Prepared for the ecoMOBILITY Program of

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# HOW TO USE THIS GUIDE

## Is this guide for you?

If you are an **EMPLOYER** interested in helping your employees find more efficient and sustainable ways of commuting to work, this guide is written for you.

Other readers will find this guide useful, but need to interpret it according to their circumstances. For example, if you are a **PROPERTY MANAGER** wanting to support your tenants' travel plans or mitigate traffic concerns at your facilities, this guide can help. If you are a **DEVELOPER, PLANNER, ARCHITECT OR ENGINEER**, this guide can show you how to support workplace travel plans by providing the right infrastructure.

## What's inside

The **GLOSSARY** explains key terms that appear throughout the guide.

**CHAPTER 1** introduces travel planning, its benefits and process, and the keys to success.

**CHAPTER 2** details the travel plan process from initial thinking through development, implementation, evaluation and updating.

**CHAPTER 3** discusses two classes of tool that are vital to effective travel planning—namely, tools for communication and promotion, and tools for gathering and analyzing information.

**CHAPTER 4** offers an inventory of measures that could be included in a travel plan, focusing on desirable means of travel (e.g. public transit, ridesharing, walking and cycling) and key methods of support (e.g. compressed work weeks, parking management, teleconferencing).

The guide concludes with a brief list of important **RESOURCES** that may be of interest.

## Using this guide

This guide is based on the premise that your employees, workplace and community will benefit from an effective travel plan. It encourages your organization to identify your own goals and objectives first, and then to develop a tailored travel plan that will give a positive return on your investment.

Travel planning is not a "one size fits all" process with standardized actions. Rather, the advice in this guide revolves around several key questions with answers that will vary from one employer, workplace and community to another. Your answers will help your organization shape a travel plan that best meets its own needs, opportunities, priorities and resources.

> Recently we launched a North America-wide commuting program that includes an exclusive ridesharing service for employees who share our commitment to reducing our environmental footprint and traffic congestion, and improving air quality. Our "Caught Green Handed" program supports sustainable environmental practices, including commuting, and demonstrates our commitment to taking real action on the environment.
>
> *Melodie Barnett, Manager Corporate Responsibility and Sustainability, Bentall LP*

# GLOSSARY

**Active transportation (active commuting)**
Human-powered travel, primarily walking and cycling but also in-line skating, skateboarding, wheelchairing and other methods

**Bike cage**
A secure, enclosed bicycle parking area for commuters, usually in a parking facility or building basement

**Car sharing**
Services that offer short-term pay-per-use car rentals, typically to the public but also to businesses as a complement or replacement to fleet ownership

**Compressed work week**
An arrangement allowing employees to work a set number of hours over fewer days (e.g. five days in four, or ten days in nine), eliminating their commute on certain days

**End-of-trip facilities**
Bicycle parking, shower and change facilities in the workplace for use by cycling or walking commuters

**Commuter survey**
An electronic, paper-based or face-to-face tool for gathering information about employee commuting habits and attitudes in a workplace

**Emergency (guaranteed) ride home**
A service offered by an employer or third party that helps non-driving commuters get home quickly and conveniently in case of family emergency, unexpected overtime or other unforeseen event. Transportation is typically by free or reimbursable taxi or car rental.

**Pool vehicles (fleet vehicles)**
Shared, employer-provided vehicles for business travel

**Ridematching**
A service to help commuters find partners for ridesharing

**Ridesharing**
Shared use of a vehicle by multiple commuters to and from work (includes both carpooling and vanpooling)

**Single-occupant vehicle**
A motor vehicle with a driver but no passengers

**Telework (telecommuting)**
An arrangement allowing workers to reduce their commuting by performing some or all of their work away from their normal workplace

**Transit pass program**
The sale of transit passes to commuters at their workplace, with the employer acting as a reseller or forwarding payroll deductions to the transit operator

**Transportation demand management (TDM)**
The use of policies, programs, services and products to influence whether, why, when, where and how people travel; TDM measures help shape the economic and social factors behind personal travel decisions, complemented by supportive land use and transportation supply

**Transportation fair**
A special workplace event to build awareness of travel plan measures by offering a range of information and services to commuters

**Transportation management association (TMA)**
An organization that offers services for workplace travel plans such as analysis, consultation, special events and ridematching for carpools or vanpools

**Travel plan**
A package of coordinated actions to encourage efficient and sustainable commuting among employees

**Vanpooling**
Shared use by multiple commuters of a van that is typically owned by a third party such as a non-profit organization, for-profit business or employer

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Workplace Travel Plans: Guidance for Canadian Employers

# 1 ABOUT WORKPLACE TRAVEL PLANS

## 1.1 INTRODUCTION

### 1.1.1 What is a travel plan?

> A workplace travel plan is a package of coordinated actions to encourage efficient and sustainable commuting among employees. A travel plan is not a document; it is an ongoing process of preparation and implementation.

An effective travel plan will answer several key questions:

- **WHY DO IT?** The travel plan will reflect an employer's business goals. It will find common ground between efficient and sustainable commuting and corporate targets in areas like finance, human resources, facilities or environmental responsibility.

- **WHAT'S THE OBJECTIVE?** The travel plan will express its desired results in terms of objectives and indicators that are tangible and easy to understand for both the employer and commuters. This helps everyone to recognize progress as it happens.

- **HOW WILL IT WORK?** The travel plan may involve "hard measures" that improve workplace facilities (e.g. bicycle parking) and "soft measures" that change policies or practices (e.g. permitting compressed work weeks). It may offer incentives (e.g. priority parking for carpools, discounted transit fares) as well as disincentives (e.g. parking charges) to support efficient choices.

- **WHO IS INVOLVED?** The travel plan will identify the roles and responsibilities of various internal individuals and groups, and perhaps outside partners.

- **WHEN WILL CHANGES HAPPEN?** The travel plan will identify a step-by-step schedule with key milestones for planning, implementation and measurement.

### 1.1.2 Helping your business

Workplace travel plans are good business practice, and address opportunities or challenges related to employee needs, operational objectives or corporate policies. The benefits for a workplace can include:

- **ENHANCED EMPLOYER PROFILE** in areas like environmental leadership, corporate social responsibility and community relations

- **GREATER PRODUCTIVITY** by strengthening employee wellness, boosting morale and improving access to labour

- **A STRONGER BOTTOM LINE** by reducing employee turnover and real estate costs, or (in the foreseeable future) by creating economically valuable carbon credits

Travel plans offer **EMPLOYEE BENEFITS** such as reduced commuting costs and carbon footprints, greater personal health and fitness levels, and better job satisfaction. They can also bring **COMMUNITY BENEFITS** by helping to reduce air pollution, greenhouse gas emissions, traffic congestion and healthcare costs.

Workplace travel plans are generally not required by government regulation, but the number of Canadian employers voluntarily undertaking some form of travel plan has grown dramatically in the last decade. The reasons for this are varied, but reflect the fact that travel plans are **WIN-WIN** propositions.

## 1.1.3 Flexibility and adaptability

> Every workplace is different, and every travel plan is different. Avoiding a "one size fits all" approach means that your organization can focus on what's right for your workplace, employees and community.

The substance and process of travel plans are both flexible and adaptable. Each workplace can tailor its travel plan to match the circumstances of its community, site, facilities, operations and employees.

Effective travel plans for a rural manufacturing plant and a downtown government office may have few similarities. They may encourage different forms of commuting, offer employees different incentives, and involve different departments within the organization. However, they are both likely to reflect the principles identified in this guide—which apply to any workplace location, size or type.

> The ideas in this guide apply to existing workplaces as well as to new, expanded, relocated or consolidated facilities. They can help employers with sites in multiple communities or countries, as well as property managers serving several employers in one location.

## 1.1.4 The process

As illustrated in the figure below, travel plans involve four phases of action:

- **BEGIN**—The employer decides whether to undertake a travel plan, and commits to the process.

- **UNDERSTAND**—The employer gathers information about the workplace, its environment and its employees in order to create or update an action plan.

- **DECIDE**—The employer identifies and approves a package of actions to be implemented.

- **ACT**—The employer implements the approved actions.

These four phases include six key steps that are discussed in **CHAPTER 2**. Each step is defined by results to be achieved, rather than by tasks to be completed—and the overall process is better understood as a sequence of thoughts, not actions. The work to answer key questions for each step will vary among workplaces, and will depend on the results of previous steps.

The three different types of travel plan are variations on this process:

- **FULL TRAVEL PLANS** are the most common. They follow the complete six-step process and are undertaken by employers that are able to address the workplace's physical and operational characteristics.



**BEGIN** — 1. GET STARTED

**UNDERSTAND** — 2. ASSESS THE SITUATION / 5. EVALUATE RESULTS

**DECIDE** — 3. CREATE AN ACTION PLAN / 6. UPDATE THE ACTION PLAN

**ACT** — 4. IMPLEMENT ACTIONS
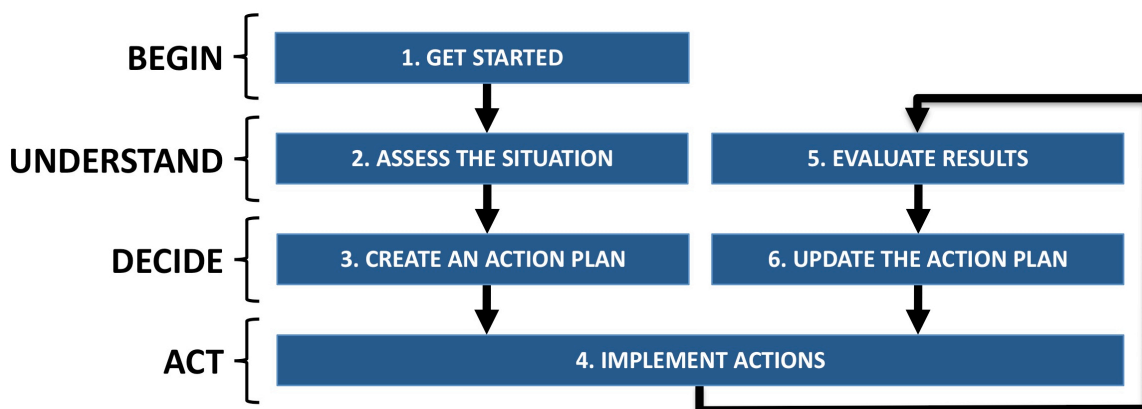
**Summary of the travel plan process**

- **TRAVEL PLAN FRAMEWORKS** are developed by employers as a guiding framework for travel planning at multiple workplaces. They are also developed by property managers as an umbrella program within which tenant employers can develop further measures. Travel plan frameworks may follow the same process as a full travel plan, but may consider a narrower range of issues. Each workplace or tenant employer in the framework is likely to have specific circumstances or objectives that require "missing pieces" to be filled in, leading to a more comprehensive travel plan.

  Property managers may find that a travel plan framework improves their ability to attract tenants, particularly in areas with chronic traffic congestion, parking shortages or poor transit service. In these markets, potential tenants may see travel plan measures as a way to attract and retain employees.

- **INTERIM TRAVEL PLANS** can be undertaken by developers in planning a new workplace that they will build but not operate. They can only follow the initial steps of the full travel plan process, with a focus on implementing site infrastructure and amenities to support efficient and sustainable commuting (e.g. bicycle and carpool parking, showers and change rooms, sidewalks and pathways). Ideally, this preliminary work would later be followed by additional travel planning by the workplace tenant.

  Many Canadian communities require workplace developers to submit transportation impact studies or other planning applications that could include elements of an interim travel plan (such as the quantity and location of bicycle parking). Developers may also find that supportive development features can improve marketability and profitability, or help meet LEED accreditation criteria for new buildings.

> "
>
> MTS Allstream's Green Plan represents a commitment to reduce our impact on the environment and help our customers, employees and stakeholders do the same. Through multiple green commuter options, we enable employees across the company and country to walk, cycle, telecommute, take transit and carpool.
>
> Our telecommute program, Workplace 2.0, leverages MTS Allstream's robust Unified Communications solutions to create a new kind of workplace—one that allows 750 employees to telecommute in the Greater Toronto Area and Montréal, with 90 percent of surveyed employees indicating teleworking makes them more productive. Our EcoPass transit subsidy program has encouraged 350 Winnipeg employees to use transit by providing a discounted monthly bus pass. The Ride Exchange program, our in-house employee carpooling initiative, is established in more than 25 communities across Canada, including five communities in Manitoba. New secure bike storage facilities have been established at various office locations.
>
> Our efforts are founded on strong corporate support and the vital energy and ideas provided by engaged employees. These come together as a strong commitment to green commuting as an integral part of our overall Green Plan. We look forward to identifying and implementing more green opportunities in the future.
>
> *Aliana Rozenek, Chief Human Resources Officer, MTS Allstream*

# 1.2    KEYS TO SUCCESS

Several keys to success have emerged from international experiences with workplace travel plans. Each success factor will mean something different at each workplace, but the absence of any could increase the risk of failure.

## 1.2.1    Commitment

Workplace travel plans lie outside an employer's core business, and also represent change—the need to do new things, or to do old things differently. In a priority-focused workplace culture, this kind of change in non-core areas faces resistance and the prospect of failure unless backed by unwavering corporate commitment. This commitment must be more than an executive decree—it must reflect true motivation and a shared purpose. Token efforts usually bring token results; even worse, they can devalue a good idea and limit future opportunities for success.

With this in mind, your travel plan is more likely to succeed if it is intended to bring real benefits or solve real problems, and if all participants understand why the travel plan is important to the organization, its workers and the broader community.

True commitment also endures past the first phase of implementation to encompass promotion, evaluation and improvement. Changes in travel behaviour can take time to achieve, and require ongoing support. As illustrated in **SECTION 1.1.4**, the travel plan process is iterative and continuous—much as employee wellness or safety programs evolve continually, and do not simply end at a given point in time.

## 1.2.2    Involvement

### Leadership

Several important individuals typically play key roles in developing and implementing workplace travel plans:

- **TRAVEL PLAN OWNER**—Typically, this person is accountable for the travel plan at a managerial level. His or her day-to-day responsibilities usually revolve around facilities, human resources or environmental management.

- **TRAVEL PLAN CHAMPION(S)**—This includes one or more people who may not have direct responsibility for the travel plan, but who provide visible leadership in support of it. It can help to have executives among a travel plan's champions, particularly if they happen to be dedicated cyclists, transit users or carpoolers.

- **TRAVEL PLAN COORDINATOR**—This person is charged with day-to-day travel plan development and implementation. Only in very large employers with thousands of workers is this likely to be a full-time, dedicated position. Usually, it is added to an existing role in parking, real estate, human resources or environmental management. In practice, this role may be called TDM coordinator, commute trip reduction coordinator or employee transportation coordinator.

Note that an individual may play more than one role, and that one role may be adopted by a group of employees.

### Staff support

Individuals in leadership roles are likely to need support from one or more of the following departments:

- **FACILITIES MANAGEMENT** staff could participate in on-site infrastructure improvements such as bike parking, showers or signage.

- **ENVIRONMENTAL MANAGEMENT** staff could support promotional events and contribute to measuring and reporting on emission reductions.

- **COMMUNICATIONS** staff could help inform employees about the travel plan, and promote travel plan measures such as special events.

- **PARKING** staff could be involved with preferential carpool or vanpool parking, bicycle parking and other aspects of parking supply or pricing.

- **SECURITY** staff could participate in improving personal security for pedestrians on larger campuses, preventing bicycle theft, and enforcing preferential carpool parking.

- **HUMAN RESOURCES** staff could be involved in travel plan measures intended to improve employee recruitment, retention or wellness, and in any changes to conditions of employment.

- **INFORMATION TECHNOLOGY** staff could be involved in travel plan measures related to the Internet or corporate intranet, such as on-line commuter surveys or telework.

- **LEGAL** staff could help ensure that issues of liability and indemnity are dealt with for travel plan measures like ridematching, vanpooling and special events.

- **FINANCE** staff could participate in planning and implementing measures like payroll-deduction transit pass programs, and in reporting on or estimating the costs of travel plan measures in general.

- **PROCUREMENT** staff could be involved in purchasing equipment (e.g. bicycle racks) or establishing contractual agreements with service providers.

### Employee population

In addition to involving key staff in various departments, it helps to consult regularly with a group of representative employees starting early in the travel plan process. This group, which could be called a **STEERING COMMITTEE** or **ADVISORY TEAM**, can help identify opportunities, foresee challenges, shape effective communications, and provide continuous feedback. Other employee groups can also play a key role in travel plans:

- **NETWORKS** of departmental or site representatives (more likely in large employers) can help with information gathering, communications and liaison with individual employees. Typically, these networks have been established for other environmental or employee-focused initiatives.

- **INTEREST-BASED STAFF GROUPS** can help plan or implement an entire travel plan or individual elements such as cycling promotion or special events. Bicycle user groups (BUGs) are one example.

- **UNIONS** can assist with employee consultation and represent the interests of workers. They may also be required to participate in the negotiation of measures that affect work hours or conditions, or employment benefits such as free parking.

## 1.2.3 Partnership

Workplace travel plans are often developed and implemented with help from outside partners. These partners may include municipal government staff, transit systems, non-profit groups, consultants and even other employers that are willing to share their experiences. Partners can offer wisdom to help employers avoid mistakes and inefficiencies, and can provide ready-made solutions that reduce delays, increase reliability and eliminate the need to "reinvent the wheel." The value of any partnership will vary with the needs and circumstances of the workplace, and with the nature and cost (if any) of the partner's assistance.

An excellent starting point in the search for valuable partners is the transportation department of your local or regional **MUNICIPAL GOVERNMENT**. You may also seek out non-profit service providers in the area of travel planning, such as **TRANSPORTATION MANAGEMENT ASSOCIATIONS (TMAs)**. In 2009, there were three TMAs in metropolitan Vancouver, nine in the Greater Toronto and Hamilton area, three in metropolitan Montréal and three elsewhere in Quebec. These associations offer a range of services, from consultation and advice to special events coordination and carpool ridematching. Depending on the degree of government support they receive, their membership fees or service charges range in cost—some are partly subsidized by government, and others help employers for free. Employers are advised to contact relevant government agencies and other organizations in their community to discuss opportunities.

> A list of travel plan service providers in various Canadian communities is available at **www.actcanada.com**.

## 1.2.4 Resources

There is no rule about how much effort or expense an effective travel plan requires, because they vary from one workplace to another as a function of size, context, complexity and objectives. However, a well-crafted action plan should always be aligned with the resources available to implement it. Typically, action plans reflect the resources known to be available, and highlight the costs and benefits of additional measures that would require extra resources.

## 1.2.5 Integration

Workplace travel plans that become part of an employer's way of doing business are much more likely to endure and lead to desired results. While initial phases such as information gathering and action planning may warrant special project status, travel plan implementation should be embedded in everyday operations. Travel plan measures are far more likely to be sustainable if the policies, practices and resources needed to support them are put in place right away.

Integration also involves information sharing and other links between workplace travel plans and other corporate endeavours such as greening or employee wellness programs, ISO14001 certification for operations, LEED certification for buildings, or the selection of new workplace locations. These initiatives offer mutual support and enhanced efficiency and effectiveness.

Nortel's GreenCommute and Integrated Work Environment (IWE) programs have been supporting and encouraging sustainable commuting within our global corporation since 1998. Evolving work trends include the desire to work closer to the customer, work teams, projects and home environments. Our internal commuter options programs facilitate the adaptation of work environments that are more productive and provide better work-life balance, and this includes how people get to and from work.

We offer a dedicated intranet GreenCommute website complete with internal ridematching, carpool parking management, bicycle parking registration and commuter tracking to help our employees track the cost and GHG impacts of their commute. Our IWE program specifically targets mobile work and we are proud that over 85 percent of our employees are mobility enabled—meaning that they can work anywhere, anytime.

Our GreenCommute and IWE programs are an embodiment of our commitment to sustainability and our corporate mandate to minimize the impact of our operations globally.

*David Dunn, Leader, Global Real Estate, Nortel*
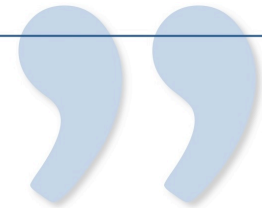
# 2 THE TRAVEL PLAN PROCESS

This chapter details the process of developing and implementing a travel plan, and is applicable to a full range of workplace contexts, motivators and resources.

The figure on the next page illustrates six key steps that are defined by OUTCOMES, not by tasks. Each step is defined by a methodical series of QUESTIONS that will lead to the desired outcomes. The best answers to each question, and the tasks required to find them, will vary from one workplace to another.

The following sections discuss the six steps in turn:

STEP 1 — GET STARTED

STEP 2 — ASSESS THE SITUATION

STEP 3 — CREATE AN ACTION PLAN

STEP 4 — IMPLEMENT ACTIONS

STEP 5 — EVALUATE RESULTS

STEP 6 — UPDATE THE ACTION PLAN

## 2.1 STEP 1 – GET STARTED
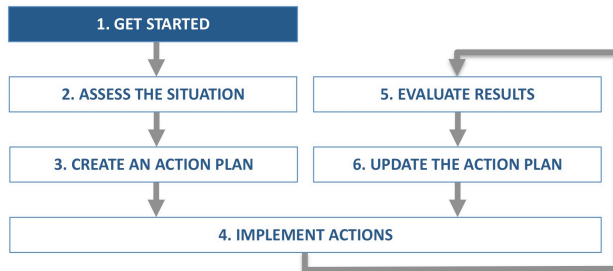
| 1. GET STARTED |
| --- |
| 2. ASSESS THE SITUATION |
| 3. CREATE AN ACTION PLAN |
| 5. EVALUATE RESULTS |
| 6. UPDATE THE ACTION PLAN |
| 4. IMPLEMENT ACTIONS |

**1. GET STARTED**

**Questions to ask:**
- How can you benefit?
- What measures are likely to help?
- Who should be involved?
- How much time and money do you need?

**Outcome:**
Commitment to develop a travel plan

### Outcome of this step

The first step of the travel plan process establishes and communicates your organization's COMMITMENT TO DEVELOP A TRAVEL PLAN—in effect, announcing that "We've decided to take action." To reach that point, you will need to consider if your workplace needs a travel plan, and what's involved in creating one.

The key questions to ask during this step are discussed below.

### How can you benefit?

This question may seem rhetorical—after all, isn't more efficient and sustainable travel clearly a good thing? However, thinking about benefits can highlight the basic motivations that will underlie your organization's future efforts, justify its resources, and guide the evaluation of progress.

**BEGIN**

### 1. GET STARTED

**Questions to ask:**
- How can you benefit?
- What measures are likely to help?
- Who should be involved?
- How much time and money do you need?

**Outcome:**
Commitment to develop a travel plan

**UNDERSTAND**

### 2. ASSESS THE SITUATION

**Questions to ask:**
- How do employees commute and why?
- What opportunities and challenges exist to influence commuting?

**Outcome:**
Information to enable
selection and evaluation of actions

### 5. EVALUATE RESULTS

**Questions to ask:**
- What overall progress have you made?
- What effect has each action had?
- What else has changed?
- Do you face new opportunities or challenges?

**Outcome:**
Information to enable
refinement of actions

**DECIDE**

### 3. CREATE AN ACTION PLAN

**Questions to ask:**
- What are your goals?
- What actions should you take?
- Who will be responsible for what?
- What process and timeline will you follow?
- What will be the costs and benefits?

**Outcome:**
Commitment to implement actions

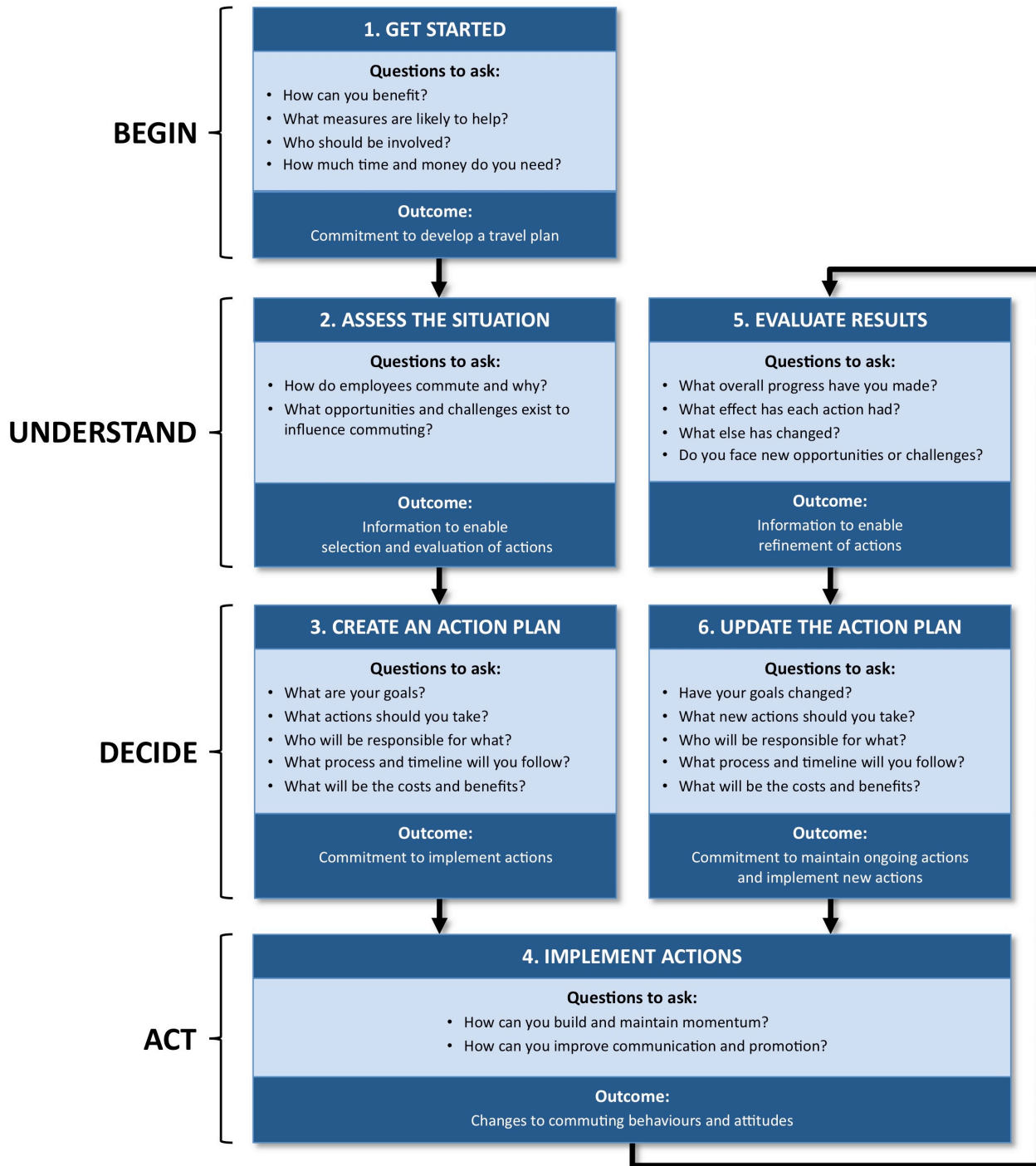### 6. UPDATE THE ACTION PLAN

**Questions to ask:**
- Have your goals changed?
- What new actions should you take?
- Who will be responsible for what?
- What process and timeline will you follow?
- What will be the costs and benefits?

**Outcome:**
Commitment to maintain ongoing actions
and implement new actions

**ACT**

### 4. IMPLEMENT ACTIONS

**Questions to ask:**
- How can you build and maintain momentum?
- How can you improve communication and promotion?

**Outcome:**
Changes to commuting behaviours and attitudes

**THE TRAVEL PLAN PROCESS: STEPS, QUESTIONS TO ASK, AND DESIRED OUTCOMES**

The word "benefit" can mean different things:

- It can mean successfully MEETING OBLIGATIONS arising from a government order, a corporate policy, or a voluntary commitment. For example, a multinational corporation may adopt a global policy that each of its workplaces will implement a travel plan to demonstrate its environmental commitment.

- It can mean OVERCOMING CHALLENGES such as a parking shortage, employee concerns over office expansion or relocation, or the impact of rising fuel prices on employee finances.

- It can mean GRASPING OPPORTUNITIES such as using telework to improve job satisfaction or reduce real estate costs, or attracting more job applicants by making it easier for non-car owners to commute to the workplace.

One way to identify potential benefits is to consult with groups and individuals in the workplace. Staff responsible for facilities, parking, security, wellness, recruitment and retention should be polled to identify any known obligations, challenges or opportunities related to employee commuting. These issues can motivate future travel plan efforts.

## What measures are likely to help?

The range of possible travel plan measures discussed in CHAPTER 4 can be intimidating. However, most travel plans are based on a small number of key measures accompanied by effective communication and promotion. Taking time to identify possible key measures early in the process can help focus your efforts, and may reassure management that the process will not waste effort considering inappropriate measures.

During the early stages of travel planning, you can use the SELF-DIAGNOSTIC CHART shown on the following page to identify major measures that may end up as travel plan priorities. Note that this chart does not replace the information gathering and analysis discussed in subsequent sections of this chapter. In fact, employers may not be able to answer the self-diagnosis questions without completing those tasks (which also aid a more thorough examination of a broader range of measures as well as a more rigorous evaluation of measures after they are implemented).

## Who should be involved?

The answer to this question will determine which groups and individuals in your workplace (see SECTION 1.2.2) should participate in travel plan development. Some will need to be involved for functional reasons, while others may simply have an interest. Participants that can offer knowledge, understanding, skills, resources or influence should be invited to join.

This question will also lead to the consideration of possible external partners:

- MUNICIPAL GOVERNMENT OR TRANSIT SYSTEM STAFF can explain their services (e.g. carpool ridematching, transit pass programs) and provide referrals to more specialized service providers.

- TRANSPORTATION MANAGEMENT ASSOCIATIONS (TMAS) often have a suite of services that can reduce the burden of effort for individual employers.

- OTHER NON-PROFIT GROUPS can offer skills in marketing, consultation, communications and incentive programs.

- TRANSPORTATION ENGINEERING OR PLANNING CONSULTANTS can offer specialized tools and skills in data collection and analysis that may be valuable in projects involving large workplaces (e.g. employment campuses with multiple buildings), sophisticated parking issues (e.g. turnover rates or electronic controls), or complex circumstances (e.g. hospitals with 24-hour operation and high client and visitor volumes). Consultants are generally necessary when a construction project requires the submission of a transportation impact study to a municipality.

- NEIGHBOURING EMPLOYERS can also help, such as by expanding the pool of potential carpoolers or lobbying local government for improved transit service.

The involvement of external partners may add cost in some cases, but it might also reduce staff effort and time requirements (e.g. by involving outside experts or pre-packaged survey tools).

> A list of travel plan service providers in various Canadian communities is available at **www.actcanada.com**.

**SELF-DIAGNOSTIC CHART: PRELIMINARY IDENTIFICATION OF POSSIBLE TRAVEL PLAN PRIORITIES**

| SUPPORTING CONDITIONS | MAJOR TRAVEL PLAN MEASURES | | | | | | |
|---|---|---|---|---|---|---|---|
| | PUBLIC TRANSIT: Employer pass program | RIDESHARING: Ridematching and/or priority parking | WALKING AND CYCLING: Enhanced bicycle parking and/or shower and change facilities | TELEWORKING: Supportive policy and practice | COMPRESSED WORK WEEKS: Supportive policy and practice | PARKING MANAGEMENT: Parking supply and/or pricing | POOL VEHICLES AND TAXIS: Provision of fleet or car-share vehicles |
| **SUPPORTING CONDITIONS UNIQUE TO ONE MEASURE** | ✓ Employees take transit or are interested in doing so<br>✓ Workplace is near quality transit service<br>✓ Transit system has an employer pass program<br>✓ Number of transit users meets minimum enrolment requirements | ✓ Employees drive to work<br>✓ Employees live in clusters more than 10 km from work<br>✓ Workplace is in a rural or suburban community<br>✓ Workplace is near carpool lanes | ✓ Employees walk or cycle to work, or are interested in doing so<br>✓ Employees live close to work (less than 5 km for walking or 10 km for cycling)<br>✓ Workplace has a strong employee health/wellness program<br>✓ Workplace is near good walking or cycling routes | ✓ Employees telework informally, or are interested in doing so<br>✓ Employees have long commutes<br>✓ Employees can work together by telephone or computer<br>✓ Workplace has strong information technology resources<br>✓ Trust exists between management and employees | ✓ Work hours are flexible | ✓ Parking facility is controlled by the employer<br>✓ Parking revenues could support other travel plan measures | ✓ Employees need to travel during the day |
| **SUPPORTING CONDITIONS SHARED BY MULTIPLE MEASURES** | | | | | | | |
| **Parking at the workplace is scarce or costly** | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Community experiences traffic congestion** | ✓ | ✓ | ✓ | ✓ | ✓ | | |
| **Employees have low levels of car ownership** | ✓ | ✓ | ✓ | ✓ | | | ✓ |
| **Employees do not need to travel during the day** | ✓ | ✓ | ✓ | | | ✓ | |
| **Employees work shifts and/or uniform hours** | ✓ | ✓ | | | | | |
| **Workplace emphasizes work-life balance** | | ✓ | ✓ | ✓ | ✓ | | |
| **Employees do not need to be physically present daily** | | | | ✓ | ✓ | | |
| **Employees have good options to driving alone** | | | | | | ✓ | ✓ |

## How much time and money do you need?

Before advancing to **STEP 2** it is worth considering how much time—in terms of both staff effort and calendar duration—and money will be required to develop your travel plan. It is difficult to generalize about effort and cost, since both are highly variable and may involve tradeoffs. For example, involving an external partner in travel plan development can reduce internal effort but may have a financial cost.
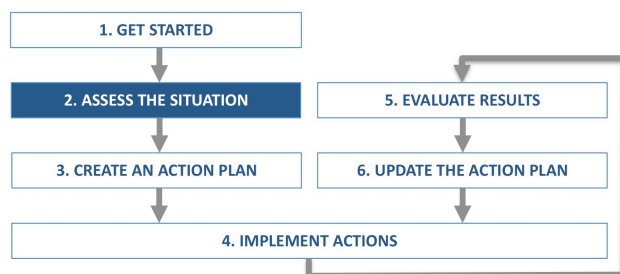
A small or mid-sized employer (e.g. with fewer than 1,000 employees) can likely complete **STEPS 1, 2 AND 3** of the travel plan process in less than four months, and sometimes in a matter of weeks. A large employer, or one in complex circumstances, can take longer. Note that these timeframes are influenced strongly by the need for numerous or complex approvals, and do not assume continuous full-time effort. Since faster processes can preserve a sense of purpose and minimize the risk of unexpected disruption, some employers start quickly by developing a travel plan that is relatively narrow in scope

(perhaps responding to a critical issue or focusing on a single travel plan measure), then return later to take a broader and more methodical look at the issues.

To see how travel plan development may be accelerated, consider a workplace where the motivation for a travel plan has a clear solution—say, a rural industrial facility located 20 km from the nearest town where many employees do not own cars and no transit service exists. Normally, **STEP 2 – ASSESS THE SITUATION** helps ensure that time and money are well spent by providing a clear understanding of the behaviours that the travel plan is trying to influence. In this case, however, effort to collect comprehensive data on employee commuting patterns and attitudes would not represent good value. The employer may simply respond by launching or subscribing to a ridesharing service that helps workers form carpools. Any commuters whose needs are not served by ridesharing measures can be consulted and helped later.

> These steps represent guidance, not rules.
> Always consider what is right for your organization.

# 2.2 STEP 2 – ASSESS THE SITUATION

```
1. GET STARTED
       │
       ▼
2. ASSESS THE SITUATION          5. EVALUATE RESULTS
       │                                │
       ▼                                ▼
3. CREATE AN ACTION PLAN         6. UPDATE THE ACTION PLAN
       │                                │
       ▼                                ▼
           4. IMPLEMENT ACTIONS
```

**2. ASSESS THE SITUATION**

**Questions to ask:**
- How do employees commute and why?
- What opportunities and challenges exist to influence commuting?

**Outcome:**
Information to help select and evaluate actions

## Outcome of this step

The second step in the travel plan process is to better understand the circumstances and issues that influence commuting in your workplace. The desired outcome of this step is **INFORMATION TO HELP SELECT AND EVALUATE ACTIONS**.

Note that there are two parts to this outcome. One is to help select measures in **STEP 3** by illuminating current commuting activities and attitudes. The other is to help evaluate measures in **STEP 5** by providing a "before" measurement of key indicators that the travel plan will try to influence (as determined by an "after" measurement).

## Answering key questions for this step

In this step, consider the state of employee commuting and the factors that could help or hinder your efforts to bring about change. The information you need and the degree to which it is already known will vary from one workplace to another. If answers are evident and there is

little desire to monitor or evaluate your travel plan, then the effort needed for this step may be limited.

Information gathering to answer this question may be shaped by the self-diagnosis and preliminary identification of likely travel plan priorities as discussed in **SECTION 2.1**. For example, if ridesharing is identified as a likely priority but teleworking is not, then the potential to increase carpooling is worth exploring in more detail than the potential for telework.

The most important tools for acquiring new information (as discussed in **SECTION 3.2**) include **WORKPLACE ASSESSMENTS**, **SURVEYS**, **COUNTS** and **EMPLOYEE CONSULTATION**. The information gathered usually reflects the travel plan's underlying motivation. For example, if heightened employee wellness is expected to be an important travel plan benefit, your information-gathering process might emphasize issues like commuting-induced stress, attitudes toward active transportation, and facilities or services that could encourage it. Information gathering can also help prepare for and mitigate the impacts of upcoming changes in the workplace (e.g. corporate relocation or expansion, or reduced parking supply).

The key questions to ask during this step are discussed below.

## How do employees commute and why?

There are several important aspects to **HOW** employees commute:

- **THE MEANS OF COMMUTING** each employee uses as their primary or secondary method of getting to work, and how those choices may vary by season (e.g. employees may cycle only in the summer)

- **COMMUTE DETAILS** including where cars and bicycles are parked, how transit fares are paid, whether carpoolers travel with family or colleagues, and so on

- **THE TIME AND/OR DISTANCE** each employee travels between home and work

There are also several dimensions to **WHY** employees commute as they do:

- **ATTITUDES AND PERCEPTIONS** of individuals (e.g. view of driving as more convenient or cheaper than transit)

- **PERSONAL CIRCUMSTANCES** including health or disability, spousal schedules, childcare needs, inability to drive, irregular work hours, and so on

- **WORKPLACE LOCATION AND SETTING** including the ability to access your site by various commuting methods (notably transit, cycling and walking)

- **WORKPLACE FACILITIES AND SERVICES** that support specific commuting methods (e.g. the availability of car or bike parking)

- **WORKPLACE POLICIES** that make some methods of commuting more or less attractive (e.g. free parking, fixed work hours, the need for employees to use their own cars for local business trips, lack of notebook computers for teleworkers)

## What opportunities and challenges exist to influence commuting?

The process of identifying and understanding opportunities and challenges is sometimes referred to as a SWOT (strength, weakness, opportunity, threat) analysis. The findings will shape your selection of travel plan measures by illuminating the **MARKET** for change (i.e. employees' likelihood of commuting differently) and the **MEASURES** that can encourage more efficient and sustainable commuting choices.

Examining the **MARKET** for change allows you to identify which groups of commuters are most likely to change their behaviour, and what barriers need to be removed for that to happen. You can also consider which commuting behaviours best support your organization's underlying goals, and how to maximize their benefits. Consider the following issues:
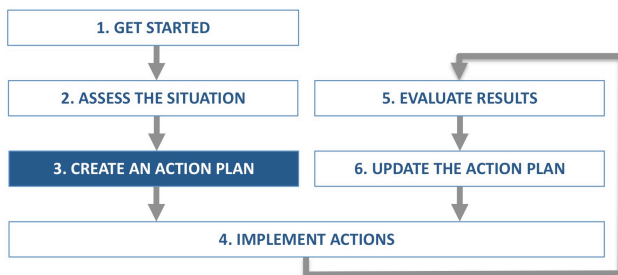
- **EMPLOYEE SATISFACTION** with current commuting activities, conditions and options

- **EMPLOYEE INTEREST** in trying or switching to other means of commuting, trying out alternative work arrangements such as telework or compressed work weeks, or improving personal fitness and health

- **EMPLOYEE CIRCUMSTANCES** that may help or hinder the implementation of travel plan measures, such as whether employees live in clusters that can favour carpooling or vanpooling

- **BARRIERS** that could prevent employees from trying or switching to other means of commuting (e.g. lack of information, safety concerns, perceived inconvenience)

Assessing the **MEASURES** to influence change requires consideration of the following possibilities:

- **WORKPLACE IMPROVEMENTS** including changes to information, facilities, policies or practices that remove barriers and meet employee needs (e.g. website links, cycling maps, shower and change facilities, flexible work hours, pool vehicle availability)

- **EXTERNAL SERVICES** that could be negotiated, accessed or purchased (e.g. improved transit services, transit pass program, online ridematching, cycling skills education, special event promotion)

## 2.3   STEP 3 – CREATE AN ACTION PLAN

| 1. GET STARTED |
| 2. ASSESS THE SITUATION |
| 3. CREATE AN ACTION PLAN |
| 4. IMPLEMENT ACTIONS |
| 5. EVALUATE RESULTS |
| 6. UPDATE THE ACTION PLAN |

### 3. CREATE AN ACTION PLAN

**Questions to ask:**
- What are your goals?
- What actions should you take?
- Who will be responsible for what?
- What process and timeline will you follow?
- What will be the costs and benefits?

**Outcome:**
Commitment to implement actions

### Outcome of this step

The third step in the travel plan process is to decide which measures to implement in your workplace, and how to go about it. The outcome of this step is not just knowledge of the actions themselves, but a **COMMITMENT TO IMPLEMENT THE ACTIONS**. The true objective is approval of both an action plan and the resources needed to put it in place.

> Note that an action plan does not necessarily need to be a formal report, and may be documented in a slide deck, memo or email message. The important thing is that approval of the action plan enables corporate commitment to implement those actions.

The key questions to ask during this step are discussed below.

### What are your goals?

The goals of an action plan should reflect the reasons your organization is developing a travel plan, based on the results of **STEP 1**. If those goals are not explicitly related to commuting, consider clarifying them through related objectives that express how commuting behaviours are intended to change:

- Objectives may be clear and quantifiable when the underlying motivation is travel-related (e.g. to eliminate parking spillover from the employer's lot, the travel plan will reduce daily parking demand by 50 vehicles within one year).

- Objectives may be more general when the travel plan motivation is not directly related to commuting (e.g. to support the organization's environmental management portfolio).

- Objectives may be approximate when the underlying motivation is based in principle (e.g. to demonstrate environmental responsibility through a 10 percent reduction in the number of driving commuters over a

certain time period). However, CAUTION is advised—behaviour change is difficult to forecast and can take longer than expected. Unrealistic objectives that come nowhere close to being met can lead to the travel plan being dismissed as a failure.

## What actions should you take?

The major elements of your action plan should be selected after considering the results of STEP 1 (notably the self-diagnostic chart), STEP 2 (notably the opportunities and challenges that exist to influence commuting), and the goals identified through the previous question.

As detailed in CHAPTER 4—TRAVEL PLAN MEASURES, your action plan could include a number of measures in three main categories:

- measures that use EDUCATION, INFORMATION AND PROMOTION to raise awareness, improve understanding, recognize participation and build positive attitudes about efficient and sustainable commuting choices

- measures that IMPROVE OPTIONS for commuting (i.e. travel facilities or services, or substitutes for travel) by improving the availability, speed, capacity or reliability of one or more options (note that this includes improved options for local business travel that reduce the need for commuters to bring cars to work)

- measures that use INCENTIVES OR DISINCENTIVES to offer individuals a tangible benefit or disbenefit related to specific methods of commuting (e.g. a transit pass subsidy)

Effective action plans identify not only the intended actions but also the PRIORITIES among them—both in terms of sequence, and in terms of importance should resource constraints come into play. They also identify INTERDEPENDENT ACTIONS, ensuring that those that rely on each other for feasibility or effectiveness can be implemented at about the same time (e.g. the launch of a ridematching service should occur at the same time that an incentive to rideshare is created by converting regular parking spaces to priority carpool spaces).

> **An effective promotion and communication strategy is one key to a successful effective action plan. Many related issues are discussed in SECTION 3.1—TOOLS FOR COMMUNICATION AND PROMOTION.**

## Who will be responsible for what?

Effective action plans clearly allocate responsibility and accountability. A workplace travel plan may require several individuals or groups to play key roles, and they should be aware of any performance expectations.

In answering this question, consider the full range of possible internal stakeholders and external partners identified in SECTION 1.2.2 and SECTION 1.2.3.

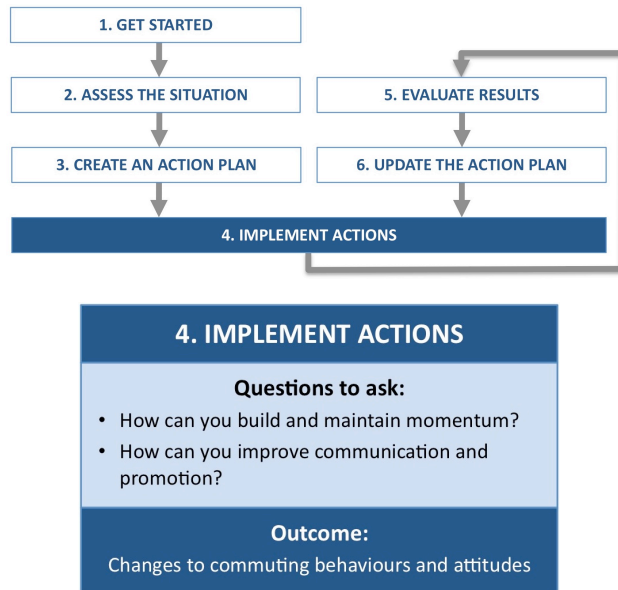## What process and timeline will you follow?

Your action plan is likely to identify key steps and schedule milestones, and their approval by management will reinforce a sense of organizational commitment. The priorities and interdependencies discussed above will play a role in shaping the action plan process and timeline. Other contributing factors may include the seasons (e.g. conduct cycling measures in the spring and ridesharing measures in the fall), resource constraints (e.g. budgets or efforts to be spread over time), operational cycles (e.g. budget approvals), and partner service schedules (e.g. for survey delivery).

## What will be the costs and benefits?

This step's desired outcome (i.e. a commitment to implement the actions) will usually result from management approval of the action plan. This approval requires communication not only of "who is going to do what by when," but of the business case describing how travel plan actions will impact your organization, both qualitatively and quantitatively.

A business case is likely to itemize the cost of each action, and may identify the expected benefits (even though they are more difficult to estimate). You may be able to estimate a financial value for reduced parking requirements, real estate savings from telework, reduced employee expenses for commuting, or other benefits that represent either primary goals or indirect outcomes.

# 2.4 STEP 4 – IMPLEMENT ACTIONS

| 1. GET STARTED | |
|---|---|
| 2. ASSESS THE SITUATION | 5. EVALUATE RESULTS |
| 3. CREATE AN ACTION PLAN | 6. UPDATE THE ACTION PLAN |
| 4. IMPLEMENT ACTIONS | |

### 4. IMPLEMENT ACTIONS

**Questions to ask:**
• How can you build and maintain momentum?
• How can you improve communication and promotion?

**Outcome:**
Changes to commuting behaviours and attitudes

## Outcome of this step

The fourth step in the travel plan process is to implement the approved action plan. The outcome of this step is to bring about **CHANGES TO COMMUTING BEHAVIOURS AND ATTITUDES** through the travel plan measures discussed in **SECTION 2.3** and in **CHAPTER 4**, and through the supporting steps discussed in this following section.

The key questions to ask during this step are discussed below.

## How can you build and maintain momentum?

Even in workplaces where the employer and key stakeholders are committed to the travel plan, the issue of momentum is worth considering. It is easy for travel plan initiatives—which, like other aspects of behaviour change, require effort and persistence—to stall and lose relevance. Travel habits are ingrained in people's lifestyles, and people rarely change them overnight. Success requires time and perseverance, and ongoing communication and promotion are as essential as they are for employee wellness programs.

Establishing and preserving momentum is an art, not a science. While the path to success will vary from one workplace to another, some basic principles can help:

- Begin implementation with a vivid expression of the organization's commitment to the travel plan's goals and actions, and a clear identification of the ways that the employer, employees and broader community can expect to benefit.

- Target early implementation of one or more "quick wins"—practical, easily understood actions that have tangible results and a high likelihood of acceptance. Delay complex, riskier or disincentive-based actions until later phases, where possible.

- Use employee communications to link events that are separated in time. For example, the announcement of new bicycle parking could refer back to the initial commuting survey that identified the need, and also mention future shower and change facility improvements. By doing so, you can encourage employees to view the travel plan as a logical sequence of improvements rather than a group of disconnected events.

- Ensure that key elements of the action plan are announced ahead of time, implemented on schedule, and measured and reported on afterward. Doing so will build a sense of continuity, and the methodical approach will reflect ongoing commitment.

- As early as possible during the implementation of travel plan actions, upgrade their status from "special project" to "permanent" by embedding them in the routine business of the workplace.
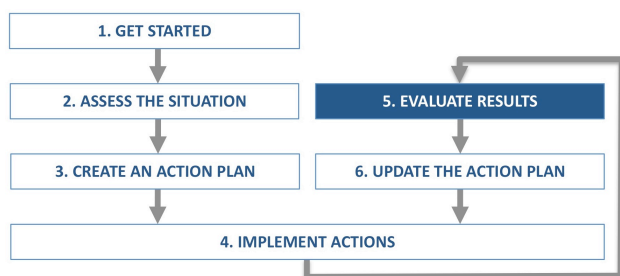
## How can you improve communication and promotion?

Communication and promotion are key elements of most successful travel plans, and **SECTION 3.1** discusses them in greater detail. Some important approaches include:

- **BE POSITIVE.** Avoid creating perceptions that the travel plan is "anti-car." Rather, show driving commuters how they can contribute to the travel plan by driving more efficiently.

- **KEEP IT SIMPLE.** Use consistency and repetition to avoid confusion and help employees internalize essential information.

- **ENCOURAGE TRIAL.** There is no need to intimidate employees by suggesting that new behaviours must be either full-time or permanent.

- **ACKNOWLEDGE ACHIEVEMENTS.** Highlighting organizational successes (e.g. by reporting on results)

and personal stories (e.g. through employee profiles) is an effective way of getting attention.

- **BUILD LINKAGES.** Connect events or changes in the workplace to those happening in the community or nationally. Workplace messages can be reinforced by information that employees receive from the media, family or friends.

# 2.5  STEP 5 – EVALUATE RESULTS

| 1. GET STARTED |
| 2. ASSESS THE SITUATION | 5. EVALUATE RESULTS |
| 3. CREATE AN ACTION PLAN | 6. UPDATE THE ACTION PLAN |
| 4. IMPLEMENT ACTIONS |

### 5. EVALUATE RESULTS

**Questions to ask:**
- What overall progress have you made?
- What effect has each action had?
- What else has changed?
- Do you face new opportunities or challenges?

**Outcome:**
Information to help refine actions

## Outcome of this step

The fifth step in the travel plan process represents a revisiting of **STEP 2—ASSESS THE SITUATION** as introduced in **SECTION 2.2**. The outcome of this step is **INFORMATION TO HELP REFINE ACTIONS**. It usually involves "after" measurements that can be compared to the "before" or "baseline" measurements taken in Step 2, and also includes an updated view of the environment for travel plan implementation.

This step is part of the iterative aspect of the travel plan process. The evaluation of results allows accountability for the resources used in travel plan development and implementation. It is also part of a "continuous improvement" process that keeps the travel plan up-to-date with changing employer objectives, workplace conditions, and employee behaviours and attitudes.

Employers may conduct an **ANNUAL EVALUATION** of their travel plan (just as they review financial results or employee performance) to support budget increases and identify opportunities for program advancement. However, the assessment and evaluation of results should not be limited to scheduled intervals—successful workplace travel plans are dynamic, and evaluation and updates should occur whenever they are useful. For example, new bicycle racks may be evaluated after one or two months to obtain user feedback on their location, capacity, design and perceived security.

The key questions to ask during this step are discussed below.

## What overall progress have you made?

Evaluate the degree to which you have achieved the goals and travel objectives from **STEP 3** by measuring high-level indicators. For example, if one of the travel plan's goals was to reduce parking spillover, this step should determine whether spillover has lessened—and if possible, whether travel plan actions were responsible for any change. Note that establishing causality can be difficult, and may rely on a qualitative assessment.

In this step, some measurements are likely to be repeats of those taken in **STEP 2** such as **SURVEYS**, **COUNTS** and **EMPLOYEE CONSULTATION**. These are discussed in greater detail in **SECTION 3.2**. However, it is common for evaluation measurements to be less comprehensive and more spread out over time than measurements taken early in travel plan development.

## What effect has each action had?

You may wish to further understand the effectiveness of individual travel plan measures. This more focused evaluation may look at more costly and difficult measures, those that seem ineffective, or those that have generated a mixed reaction among employees.

The impact of a single measure might be assessed using broad employee surveys and counts. However, it can be difficult to separate the effects of several measures that target a single behaviour (e.g. encouraging carpooling through ridematching services, priority parking spaces and discounted parking rates). In such cases, a reliable approach is simply to ask individuals which measure most influenced them. Engaging employees who actively use a particular commuting option is a good way to limit the scope of data collection, and can yield more reliable information than general surveys.

## What else has changed?

As travel plan measures are implemented, other circumstances may change. Some (e.g. rising fuel prices) may directly affect commuter behaviours and attitudes, others (e.g. new hiring or layoffs) may affect the travel plan audience, and still others (e.g. the local transit system's introduction of a new employer transit pass program) represent new opportunities or challenges.

It is useful to scan the workplace's internal and external circumstances to identify whether any changes have affected the travel plan's effectiveness or might influence future directions.

## Do you face new opportunities or challenges?

Based on the answers to the previous questions, it is worth considering whether the opportunities and challenges first identified in **STEP 2** have changed significantly—and if so, what new opportunities and challenges exist. The answer to this question will provide important input to the next step, when the action plan is updated.
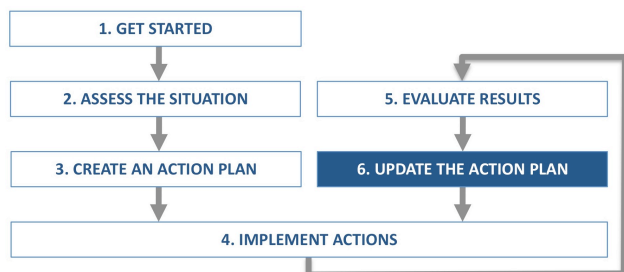
> As a member employer, the City of Mississauga is able to attest to the accomplishments of the Smart Commute Program. Since launching a commuter options program in 2007, the City has reduced more than 38,000 km of vehicle travel and nearly 9,000 kg of $CO_2$ emissions associated with workplace commutes.
>
> *Hon. Hazel McCallion, Mayor, City of Mississauga*

# 2.6 STEP 6 – UPDATE THE ACTION PLAN



## 6. UPDATE THE ACTION PLAN

**Questions to ask:**
- Have your goals changed?
- What new actions should you take?
- Who will be responsible for what?
- What process and timeline will you follow?
- What will be the costs and benefits?

**Outcome:**
Commitment to maintain ongoing actions and implement new actions

## Outcome of this step

The sixth step in the travel plan process represents a revisiting of **STEP 3—CREATE AN ACTION PLAN** as introduced in **SECTION 2.3**. The outcome of this step is the creation of a **COMMITMENT TO MAINTAIN ONGOING ACTIONS AND IMPLEMENT NEW ACTIONS** within a continuous improvement process that keeps the travel plan up-to-date with changing employer objectives, workplace conditions, and employee behaviours and attitudes.

As with **STEP 5**, **STEP 6** may be more spread out in time than earlier steps. In fact, a gradual approach to updating the action plan can reduce the intensity of work by allowing measures to be refined one at a time rather than all at once. Together, **STEP 5** and **STEP 6** represent an ongoing, iterative process of measurement and refinement that is likely to be much less sequential in nature than **STEPS 1 THROUGH 4**.

The key questions to ask during this step are discussed below.

## Have your goals changed?

Either as a result of progress made toward the initial goals of the travel plan, or as a result of shifting circumstances identified in **STEP 5**, you may wish to change the overall travel plan goals that were set in **STEP 3**. This can lead to targets that are either more or less ambitious, or even to the creation of entirely new goals.

## What new actions should you take?

After considering the results of the travel plan evaluation in **STEP 5**, assessing new opportunities and challenges and reviewing your goals and objectives, you may wish to terminate or change individual travel plan actions, or to introduce complementary actions. As in **STEP 3**, new actions may represent improved options, incentives and disincentives, or education and information. A revised action plan should continue to reflect the issues of priority and interdependency among individual actions.

## Who will be responsible for what?

Your updated action plan should continue to allocate responsibility and accountability, ensuring that key individuals or groups remain aware of their roles in the travel plan.

## What process and timeline will you follow?

Major steps and milestones for updated elements of the action plan should be identified, along with deadlines for key actions.

## What will be the costs and benefits?

While a new "business case" for the revised travel plan (like the one developed in **STEP 3**) may not be needed, it may be necessary to explain the costs and benefits of significant changes in order to obtain management approval. The prediction of future impacts can be simplified and made more credible by basing it on the results of **STEP 5,** which identified the impacts of the travel plan so far.

# 3 TRAVEL PLAN TOOLS

This chapter discusses tools that can help you develop and implement a travel plan:

- **SECTION 3.1—TOOLS FOR COMMUNICATION AND PROMOTION** presents several ways to maximize your travel plan's effectiveness. These tools are relevant to all six steps of the travel planning process described in **CHAPTER 2**, and support many of the travel plan measures discussed in **CHAPTER 4**.

- **SECTION 3.2—TOOLS FOR GATHERING AND ANALYZING INFORMATION** offers more detail on tools to help assess your situation (**STEP 2**) and evaluate the results of your travel plan (**STEP 5**).

> A number of other sources address these tools in detail. Notably, Transport Canada's *Commuter Options: The Complete Guide for Canadian Employers* (see Resources) discusses most of the tools reviewed in this chapter.

## 3.1 TOOLS FOR COMMUNICATION AND PROMOTION

### 3.1.1 Travel plan identity

Your travel plan could benefit from having a distinctive identity (i.e. name and logo), particularly in a large organization. Some examples of travel plan names include Green Commute, TravelWise, in Motion, TREK and *Éconavette*.

It is important to work with corporate communications staff to develop a travel plan identity, since some organizations discourage the use of logos that could "blur" the employer's principal identity. Qualified communications or design consultants can develop alternatives and produce artwork for various media.

### 3.1.2 Employee communications

#### Communication strategy

Clear, consistent, timely and effective communications are fundamental to travel plan success. For this reason, consider creating an overall communication strategy. Such a strategy may evolve throughout the travel planning process, and should aim to:

- express commitment to the travel plan

- explain the travel planning process

- provide notice of changes to facilities, services, policies and practices

- encourage employee participation in information gathering and special events

- build employee awareness of and willingness to try new methods of commuting

- provide feedback to commuters as well as internal and external partners

Your organization's existing communication tools and channels may or may not be sufficient for the travel plan. Typical tools include email, intranet sites, newsletters, posters and flyers. However, the most effective communication can be through person-to-person contact: presentations at staff meetings and new employee orientation sessions, lunchtime discussion forums, or staffed kiosks in high-travel locations.

### Messaging

Key messages that can build travel plan support and participation include:

- **BENEFITS**—The opportunities that motivated your travel plan are an important basis for communications.

- **ACCOMPLISHMENT**—The results that have been achieved by groups and individuals deserve recognition. Remember to acknowledge employees who were already "doing the right thing" and to not focus only on employees who have changed their commuting behaviour.

- **LEADERSHIP**—Managers and employees both want to hear that the organization is a leader in social and environmental responsibility.

- **FLEXIBILITY AND OPPORTUNITY**—People see value in having improved options for commuting, even if they do not use them.

## 3.1.3  Individualized marketing

Personal travel decisions are tied closely to work and family responsibilities, home and work locations, economic status, environmental awareness, age and physical ability. Given a particular set of individual circumstances and commuting options, some individuals may change their behaviour if provided with the right combination of information and incentives; others simply do not have the ability, opportunity or openness to make that change.

In recognition of these facts, a technique known as **INDIVIDUALIZED MARKETING** has proven very effective in helping people make more sustainable commuting choices. The concept is simple: figure out who is most likely to

change how they commute, and give them customized information, training and incentives to make that change. Note, however, that individualized marketing requires significant effort, and is typically conducted in partnership with an external service provider.

Individualized marketing initiatives in workplaces allow commuters who are interested in trying new options to identify themselves and their areas of interest to the travel plan coordinator. They then receive a customized package of information, and sometimes a one-on-one visit. They may be given cycling route maps, fuel-efficient driving education materials, transit schedules, in-person ridematching orientation, incentives like free transit tickets or discount coupons, and promotional items like hats, T-shirts, pens or keychains.

One advantage of individualized marketing strategies is that it identifies people who are interested in changing their commuting patterns. This makes follow-up measurement more efficient by allowing a focus on that group to find out whether their behaviour has changed.

## 3.1.4  Incentive programs

Incentives encourage employees to adopt (or try) more efficient and sustainable methods of commuting. They promote positive behaviours while also promoting the travel plan itself. **CHAPTER 4** discusses incentives that support individual commuting options (e.g. umbrellas for walkers, free bike tune-ups for cyclists, gas coupons for carpoolers). Other incentives reward the use of commuting options more generally:

- **LOYALTY INCENTIVES**—You might reward participants for the duration or consistency of their participation, or for reaching milestones (e.g. 1,000 km commuted by bicycle). By requiring participants to report their commuting habits, loyalty incentives also help measure travel plan impacts.

- **PARTICIPATION INCENTIVES**—Employees might complete a survey or join in a special event if they can win a prize by doing so.

- **PERSONAL RECOGNITION**—Highlighting the accomplishments of individuals can give your travel plan a personal angle and create positive role models.

The issue of financial incentives can be complex. While free parking is a powerful (and common) incentive to drive to work, financial incentives for other commuting methods are more rare. One reason for this is that free parking for employees is rarely treated as a taxable employment benefit under federal tax law. On the other hand, an employer that "levels the playing field" by providing a financial incentive for non-drivers (e.g. a cash allowance to help pay for transit or vanpool fares, bicycle maintenance, walking shoes, or sharing carpool costs) must treat that incentive as a taxable benefit in most cases, which diminishes its value (employer-paid transit passes in Quebec are one exception). The idea of employer-provided transportation allowances for commuters has been very effective in the United States, where such incentives are non-taxable within limits.

## 3.1.5  Special events

Special events can help attract attention, build participation and celebrate successes. There are national, provincial and local events in which employers and/or individual employees can participate:

- **COMMUTING EVENTS**—Annual events in many communities encourage employers and commuters to register and record their participation. These include the national Commuter Challenge during Environment Week and the Clean Air Commute in the Greater Toronto Area.

- **CANADIAN RIDESHARE WEEK**—This national event occurs annually during the first full week of October.

- **CANADIAN TELEWORK WEEK**—Planning is underway for a national event to be held during the winter.

- **ENVIRONMENT WEEK**—Environment Week is a national event in June that raises awareness of key environmental issues, with **CLEAN AIR DAY** occurring on Wednesday during the week.

- **EARTH DAY**—This worldwide event is held on a Saturday in April, but related events are often held during the workweek.

- **CYCLING EVENTS**—Many cities dedicate a week or month to promoting cycling in general, or cycling for specific purposes such as commuting to work.

- **INTERNATIONAL CAR FREE DAY**—Several Canadian cities hold celebrations on or around September 22.

Other workplace events can celebrate achievements and increase employee awareness. Examples include:

- **TRANSPORTATION FAIRS**—These events (which can also have a broader environmental theme) are a common service of external partners but can be organized directly by employers. A lunch-hour or all-day fair could include booths, demonstrations, workshops, vendor displays, and personal assistance with ridematching or transit commuting.

- **INTERNAL CHALLENGES**—A "commuter challenge" between different employee groups to see which can achieve the highest participation rate, the most "green" kilometres travelled, or the fewest car trips on a given day or week is a good way to raise awareness and encourage employees to try something new.

- **COMMUTER BREAKFASTS**—A fun way to reward travel plan participants is to organize a special breakfast for active commuters, ridesharers and transit users.

> As the new Executive Director I did not hesitate to join the Allégo program. The value of this innovative project is clear, and I am very pleased to support the pursuit of a healthier working environment.
>
> Taking public transit is an effective way to reduce greenhouse gas emissions and improve our physical health, and it helps me—a newcomer to Montréal—to discover the city's beauty. Every small step counts where the environment is concerned.
>
> *Fabrice Brunet, Executive Director, Sainte-Justine University Hospital Center*
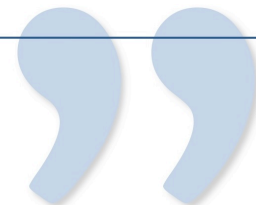
# 3.2 TOOLS FOR GATHERING AND ANALYZING INFORMATION

Having accurate and meaningful information is one key to travel plan success, particularly for **STEP 2** and **STEP 5** of the travel planning process. Two key principles provide an overview to this section:

- **DISTINGUISH BETWEEN "MANDATORY" INFORMATION THAT YOU NEED AND "OPTIONAL" INFORMATION THAT YOU WANT.** Information gathering can take a lot of time and effort, so be cautious when deciding on scope and level of detail. You will need a basic understating of commuter behaviours and attitudes to answer key questions. You are also likely to need some extra information to resolve specific issues on selected topics. Carefully consider your *wants* and *needs*, given that (for example) lengthy surveys can be intimidating to answer, costly to conduct and difficult to analyze. In practice, information collected "just in case" is rarely put to good use.

- **GATHER RELIABLE INFORMATION IN A REPLICABLE WAY.** The information your organization gathers on commuter behaviour and attitudes will be the basis of many travel plan decisions. The initial assessment should be *reliable*—that is, it should reflect conditions accurately. It should also be *replicable* to enable a fair, apples-to-apples comparison of before and after conditions.

## 3.2.1 Workplace assessment

In **STEP 2** of the travel planning process, you will examine your workplace to identify opportunities and challenges. Where your workplace is, what's in and around it, and how it operates will all influence how your employees commute. By better understanding these issues, you can build a travel plan that meets your organization's unique needs by removing key barriers and meeting the needs of individual commuters.

> A comprehensive list of questions to help you assess your workplace is provided in Annex 3.A of Transport Canada's *Commuter Options: The Complete Guide for Canadian Employers* (see Resources).

Workplace assessment has three themes:

- **WORKPLACE LOCATION AND SETTING**—These influence employees' ability to reach your site. Key issues include your geographic location, what transportation facilities and services exist (e.g. public transit or cycling networks), and what support services are available.

- **WORKPLACE FACILITIES AND SERVICES**—These can motivate or discourage different commuter choices. Some key issues include facilities and services for commuters (e.g. on-site sidewalks and pathways, bicycle parking, shower and change facilities, transit information and fare sales, ridematching services, priority parking for carpools, drop-in stations for teleworkers), parking supply and pricing, employee Internet access, corporate communication channels, teleconferencing and videoconferencing equipment, and on-site amenities like cafeterias, childcare and bank machines.

- **WORKPLACE POLICIES AND PRACTICES**—Workplace policies and practices (explicit or implicit, formal or informal) can have a real impact on a travel plan. Key issues include working hours, dress code, teleworking, parking management, and local business travel.

# 3.2.2 Commuter surveys

Surveys are an effective way to improve your understanding of commuter behaviour and attitudes, but it can be challenging to use them effectively.

## Survey content

Commuter surveys help identify how and why people travel the way they do, and what barriers and opportunities exist for different behaviours. They usually capture the following information:

- **PERSONAL DATA** including home address or postal code, work location (for organizations with multiple sites), job type or function, employment status (full-time, part-time and/or teleworker), gender, age and hours of work

- **COMMUTE INFORMATION** including distance or time for the trip between home and work, usual methods of commuting, and reasons for choosing them

- **BARRIERS AND OPPORTUNITIES** including why other commuting methods are unattractive, willingness to consider other options, and what improvements to other options could make them more attractive

## Survey type

Employee surveys use one of two key methods.

**CENSUS SURVEYS** that ask questions of all employees (or a subgroup such as cyclists) are the most common way that employers gather information from commuters. They are simple to administer and analyze, and can help build understanding of your travel plan by engaging a significant proportion of employees. However, it is important to recognize that census surveys only provide statistically reliable results when they have a very high (and usually very unlikely) response rate approaching 100 percent. For example, if only half of employees respond to a census survey then a finding that 18 percent of survey respondents take public transit cannot automatically be taken to mean that 18 percent of *all employees* take public transit. In this case, the reliability of the survey results would require confirmation through (for example) actual counts of transit users.

Many organizations repeat census surveys every year or two. While the statistical reliability of any one survey may be limited, the use of the same survey questions and delivery each time can help to spot changes in behaviours, barriers and opportunities over time.

**RANDOM SAMPLE SURVEYS** ask questions of a randomly selected group of employees. They are an effective alternative to census surveys in large workplaces where statistical reliability is desired but a very high response is not realistic, and where direct observations of commuters are impractical. However, random sample surveys are difficult—respondents must be randomly selected to be representative of all employees, and analysis requires sophisticated statistics. To conduct a random sample survey, it is highly recommended that your organization obtain expert assistance.

## Survey timing

The timing of commuter surveys (for both before and after measurements) is a key issue for reliability and replicability. Surveys should be conducted at times that reflect average conditions—typically, during the spring or fall to avoid summer vacations and extreme winter weather. It also means on Tuesdays, Wednesdays and Thursdays, rather than Mondays or Fridays when the effects of weekend activities and compressed work weeks are noticed. School holidays, when parents may still come to work but modify their usual commutes, and unseasonable weather conditions (e.g. extreme cold or hot spell) should also be avoided.

## Survey distribution

There are three basic methods of distributing surveys. **PAPER QUESTIONNAIRES** let respondents write in answers at a time that is convenient for them. They can be labour-intensive to tabulate, but can maximize response rates in organizations where computer access is limited. **ONLINE QUESTIONNAIRES** require respondents to fill in answers on an electronic form. They are more environment-friendly than paper surveys, respondents can find them appealing, and analysis is relatively easy. Online surveys work well in work environments where most employees have ready access to a computer. **PERSONAL INTERVIEWS** can be conducted in person or by phone. Finding a mutually convenient time can be challenging, and they can be labour-intensive (so are better suited to sample surveys in

larger organizations). Interviews work best in environments where employees typically work at a desk with telephone access.

There are several ways to encourage a high response rate, regardless of how the survey is distributed. Keep the questionnaire short and simple, and use multiple-choice questions. Pre-test the questionnaire to ensure that it is easy to complete and straightforward to analyze. Clearly communicate to staff what the survey is for and when responses are due, and ask managers to help encourage employee responses. Assure respondents that answers are confidential, and that they will hear about the survey results when complete. Offer an incentive to complete the survey, such as a small reward to every respondent or one big prize to be drawn from all respondents' names. Remind employees of the deadline for responses—several times, if necessary.

### Snapshot surveys

Broad commuter surveys are particularly helpful in travel plan development. Repeating them (or elements of them) after travel plan implementation can provide valuable information to support program evaluation. However, less comprehensive snapshot surveys can also play an important role in identifying the impacts of your travel plan.

Snapshot surveys offer a fast, flexible and effective way to test general employee awareness, evaluate the response of key groups to new measures (e.g. what cyclists think of new bike racks) and gauge opportunities (e.g. what proportion of transit users would be interested in buying a pass through payroll deduction). They are most useful where a rough count, rather than precise measurement, is all that is required. Snapshot survey respondents can be selected arbitrarily (e.g. the first 50 employees arriving in the lobby on a given day) or to reflect the issue in question (e.g. people parking a bicycle). Snapshot surveys can offer replicability (allowing comparisons over time) if they repeat the same method carefully.

> More information on surveys, including a sample commuter survey form, is provided in Chapter 3 of Transport Canada's *Commuter Options: The Complete Guide for Canadian Employers* (see Resources).

## 3.2.3 Counts

Counts are direct observations of individual commuters, automobiles and/or bicycles. They offer reliable, factual information on employee travel patterns. Counts can verify and supplement survey results, and can also provide evidence of travel plan effectiveness. The potential for counts at your workplace will depend on its location and immediate environment: buildings or campuses with limited and well-defined access points are ideal; multiple-tenant buildings with street-front entrances are not.

Some general guidelines for counts can maximize their usefulness. First, count only what is necessary. Second, repeat important counts (e.g. parked vehicles, transit users) at regular intervals to document seasonal variations and the impacts of events. As with surveys, conduct counts on "typical" days. Ask your local government or transit authority staff for assistance, and minimize costs by using staff and volunteers whenever possible.

Two types of count are most common:

- **SCREENLINE COUNTS** tally every person crossing an imaginary workplace boundary in a given time period, and classify each person as a driver, passenger, transit user, cyclist or pedestrian.

- **PARKING COUNTS** record parking demands by time of day and type of space (e.g. accessible spaces, executive spaces, preferential carpool spaces, visitor spaces, bicycle racks). Over time, they are a reliable way to measure changes in the proportion of employees who drive to work, which is a common indicator of travel plan success.

# 3.2.4 Consultation

Talking directly with employees is an excellent way to explore personal opinions, motivations and challenges.

**FOCUS GROUPS** are used to test an idea, measure or process by examining the opinions of a small group of people. During travel plan development, focus groups can explore commuting barriers and opportunities, and issues raised in a commuter survey. They can also test employee acceptance of alternative measures such as different bike rack designs or preferential carpool parking policies. Focus groups are more likely to be productive when they are led by an experienced facilitator who understands the issues, keeps the discussion on-track, and encourages participants to raise as many opinions and ideas as possible. The size of a focus group can vary from six to 15 people—guaranteeing everyone a chance to speak, but ensuring that different viewpoints are raised.

**OPEN HOUSES** allow you to present information and obtain feedback about your travel plan. By giving employees a chance to learn about the travel plan at their convenience in a neutral environment, open houses can build awareness and encourage individuals to raise issues that are important to them. Organizing displays so that people proceed through a sequence of exhibits is an effective way to present new proposals or review previous developments. As an alternative approach, creating "stations" where attendees can pick up information that interests them is effective when different subjects are of intense interest to distinct audiences (e.g. transit users or cyclists).

# 3.2.5 Key indicators

Several indicators are useful to quantify commuter activity, helping to compare workplaces or track changes over time. (Note that other indicators describing more qualitative issues like employee satisfaction may be equally important to your organization, but are not discussed here.)

**MODAL SHARE** describes the relative rate of use of different methods of commuting, and is easy to explain. Modal share is expressed in percentage terms for each mode of travel, and is calculated as:

$$\text{\% Modal share (by mode)} = 100 \times \frac{\text{Number of persons arriving (by mode)}}{\text{Number of persons arriving (total)}}$$

**SINGLE-OCCUPANT VEHICLE (SOV) RATE** expresses the popularity of driving alone among commuters, which is a principal interest of travel plans. The SOV rate is expressed in percentage terms, calculated as:

$$\text{\% SOV} = 100 \times \frac{\text{Number of persons arriving by SOV}}{\text{Number of persons arriving (total)}}$$

**AVERAGE VEHICLE RIDERSHIP (AVR)** is the ratio of the total number of people arriving at the worksite by all methods (including telework) to the number of private motor vehicles arriving at a worksite. A rising AVR means that more people are getting to work without driving. AVR is expressed in terms of persons per vehicle, and is calculated as:

$$\text{AVR} = \frac{\text{Number of persons arriving (total)}}{\text{Number of personal motor vehicles arriving}}$$

**AUTO OCCUPANCY** describes the popularity of ridesharing at your worksite. Rising auto occupancy means that the proportion of vehicle passengers is rising, compared to the number of drivers. Auto occupancy is expressed in terms of persons per vehicle, and is calculated as:

$$\text{Auto occupancy} = \frac{\text{Number of persons arriving by personal motor vehicle}}{\text{Number of personal motor vehicles arriving}}$$

**VEHICLE-KILOMETRES TRAVELLED (VKT)** is the total distance travelled by employees' private vehicles in commuting to your worksite. VKT is often used as a basis for estimating travel plan impacts on air quality, climate change, congestion levels and private commuting costs. It is expressed in vehicle-kilometres travelled per day, and is calculated as:

$$\text{VKT (vehicle-km per day)} = \text{Number of persons driving to work, alone or with passengers} \times \text{Average one-way length of driver trips (km)} \times \text{2 trips per day}$$

The average length of driver trips can be estimated from (in decreasing order of preference) commuter survey results, corporate human resource data, or community averages provided by local government.

**AUTOMOBILE EMISSIONS** produced by private vehicles in commuting to and your worksite can be used to demonstrate travel plan impacts on climate change (through GHG emissions) and local air quality (through emissions of several other contaminants). Note that public transit use also leads to emissions, but they are more complex to estimate and are typically considered to be zero for travel plan reporting purposes.

Major non-GHG air contaminants can damage human, animal and environmental health in a variety of ways, and include the key precursors of both smog and acid rain. They are:

- **CO**, carbon monoxide
- **NO$_X$**, nitrogen oxides
- **SO$_2$**, sulphur dioxide
- **VOC**, volatile organic compounds

- **TPM**, total particulate matter less than 100 microns in diameter
- **PM$_{10}$**, particulate matter less than or equal to 10 microns in diameter
- **PM$_{2.5}$**, particulate matter less than or equal to 2.5 microns in diameter

For any given pollutant, emissions are calculated as:

$$\text{Pollutant emissions (g of pollutant per day)} = \text{VKT (vehicle-km per day)} \times \text{Emission factor (g of pollutant per vehicle-km)}$$

Actual emission factors vary for individuals according to their driving habits and their vehicle's fuel efficiency, but average emission factors for each province and Canada as a whole are given in the following table. Note that use of the GHG emission factor gives an estimate of all greenhouse gases resulting from fuel combustion, expressed an equivalent mass of carbon dioxide (CO$_2$e).

**SUGGESTED EMISSION FACTORS (GRAMS OF POLLUTANT PER VEHICLE-KILOMETRE TRAVELLED)**

| Province or territory | GHG (CO$_2$e) | CO | NO$_X$ | SO$_2$ | VOC | TPM | PM$_{10}$ | PM$_{2.5}$ |
|---|---|---|---|---|---|---|---|---|
| British Columbia | 263 | 11.4 | 0.610 | 0.00423 | 0.672 | 0.0168 | 0.0165 | 0.00803 |
| Alberta | 263 | 11.5 | 0.612 | 0.00424 | 0.673 | 0.0168 | 0.0166 | 0.00804 |
| Saskatchewan | 262 | 11.4 | 0.609 | 0.00421 | 0.672 | 0.0168 | 0.0165 | 0.00803 |
| Manitoba | 261 | 11.4 | 0.608 | 0.00420 | 0.671 | 0.0168 | 0.0165 | 0.00802 |
| Ontario | 258 | 11.3 | 0.601 | 0.00415 | 0.669 | 0.0168 | 0.0165 | 0.00799 |
| Quebec | 254 | 11.2 | 0.593 | 0.00409 | 0.667 | 0.0167 | 0.0165 | 0.00797 |
| New Brunswick | 260 | 11.4 | 0.605 | 0.00418 | 0.670 | 0.0168 | 0.0165 | 0.00801 |
| Nova Scotia | 258 | 11.3 | 0.602 | 0.00416 | 0.669 | 0.0168 | 0.0165 | 0.00800 |
| Prince Edward Island | 257 | 11.3 | 0.599 | 0.00414 | 0.668 | 0.0168 | 0.0165 | 0.00799 |
| Newfoundland and Labrador | 261 | 11.4 | 0.608 | 0.00420 | 0.671 | 0.0168 | 0.0165 | 0.00802 |
| Yukon/Northwest Territories/ Nunavut | 263 | 11.4 | 0.610 | 0.00423 | 0.672 | 0.0168 | 0.0165 | 0.00803 |
| National average (weighted by provincial population, 2006) | 258 | 11.3 | 0.602 | 0.00416 | 0.669 | 0.0168 | 0.0165 | 0.00800 |

Note: These emission factors were calculated using Transport Canada's Urban Transportation Emissions Calculator (UTEC) at www.tc.gc.ca/utec. The factors reflect 2006 ratios between cars and light trucks within the light-duty passenger vehicle fleet of each jurisdiction, an assumed 98.5:1.5 ratio between gasoline-powered and diesel-powered light-duty passenger vehicles, and an assumed 25:75 ratio between highway and city driving conditions. Factors reflect vehicle operation only, and exclude upstream emissions from fuel production, refining and transportation.

# 4 TRAVEL PLAN MEASURES

## 4.1 OVERVIEW

This chapter describes workplace measures to improve the options available to individual commuters, and to establish incentives (or disincentives) that make those travel options more attractive. **SECTIONS 4.2 TO 4.6** discuss measures that revolve around desirable forms of commuting—namely public transit, ridesharing, walking and cycling, efficient driving and teleworking. **SECTIONS 4.7 TO 4.9** describe broader approaches to encouraging the use of commuter options in general—namely compressed work weeks, parking management strategies, and the provision of alternatives to personal automobiles for local business travel.

## 4.2 PUBLIC TRANSIT

### Opportunities and challenges

Public transit's potential role in your travel plan is largely a function of the quality of service (i.e. availability, frequency, reliability and speed) at your workplace. Aside from any service quality concerns, key challenges to greater transit use may include employee concerns about personal security (especially in isolated locations or after dark) and bad weather (walking and waiting in cold, rain, snow and wind).

Another common obstacle to transit commuting is the need for employees to bring their car to work so they can make local business trips during the day. Giving workers other options for local business travel (e.g. taxi chits, transit tickets, fleet cars or bicycles) makes transit a more viable way of getting to and from work.

### Public transit service

Transit systems are generally willing to consider adjusting their routes, bus stop locations, service hours or frequencies to better capture potential ridership. It is worth discussing opportunities with your local transit provider, especially if the results of your commuter survey offer evidence of the potential for greater ridership.

### Transit pass programs

Many transit systems (but not all) sell transit passes through employers. Typically, participating employees use a convenient "permanent" transit pass while employers deduct discounted fares from their paycheques and transfer those funds to the transit system. In some cases, employers purchase and resell discounted monthly passes (sometimes with a subsidy, which is a taxable benefit).

> Employees using TransLink's Employer Pass Program love the convenience. It's automatically deducted from their pay, and it costs them less than purchasing it themselves.
>
> *Michelle Sing, Director, Human Resources,*
> *Volunteers and Children's Services, YWCA*

### Shuttles

At remote suburban or rural workplaces, an obstacle for potential transit users may be the poor connection between the workplace and the nearest rapid transit station. Employers faced with this situation may, on their own or in partnership with others, consider initiating a private shuttle service between their workplace and the transit station to make transit use more feasible or attractive.

### User information

Difficulty in finding or understanding basic information on transit fares, routes and schedules can prevent employees from even attempting to use transit. Employers can help by providing links from their Intranet site to the local transit system's Web site. Many transit systems offer trip planning services (via the Web, email, telephone and even in person) and will provide customized, easily understood information packages for individual employers.

### Special events

Many transit systems actively participate in annual events like Environment Week, and may be willing to attend corporate environmental fairs or similar events. Contact your local system to find out what services they can offer (e.g. on-site trip planning services, free tickets for new users).

### Emergency (or guaranteed) ride home

Particularly in locations where employees rely on express bus routes that only operate in peak periods, an emergency ride home program offers assurance that transit commuters will be able to get home quickly and conveniently in case of family emergency or unexpected overtime.

### Other support and incentives

Flexible working hours allow commuters to take advantage of the fastest and most convenient transit services. It can be frustrating to be unable to leave work until 4:30 p.m. when the express bus leaves at 4:20 p.m. every day.

Travel plans can include reward programs that let employees track their commuting activity. Transit commuters who accumulate a certain number of annual transit trips could be eligible for recognition or a prize of some type.

## 4.3  RIDESHARING

### Opportunities and challenges

Ridesharing can be successfully promoted within most travel plans, with its potential determined largely by employee characteristics. Employees who live close together are more likely to carpool with each other, as are employees who live far from the workplace (because the added effort in dropping off and picking up passengers can seem more of a burden when the actual commute is short).

Challenges to carpooling include small employee populations and difficulty finding compatible carpool partners, but both of these can be overcome by offering a ridematching service. Employee concerns may include personal security when sharing a ride with strangers, and automobile liability insurance when regularly carrying passengers. Ridesharing with co-workers typically eliminates security concerns, and drivers can check any liability issues by contacting their insurance providers.

A common obstacle for potential carpool passengers is the need to bring their car to work so they can make business trips during the day. Giving workers other options for local business travel (e.g. taxi chits, transit tickets, fleet cars or bicycles) makes sharing a ride in someone else's car a more viable way of getting to and from work.

Other supportive opportunities include the existence of high-occupancy vehicle (HOV) priority lanes in travel corridors used by employees, which can reduce delay for carpools and vanpools and make their travel times more reliable.

## Ridematching

Many Canadian communities offer public ridematching services, usually Web-based but sometimes with a telephone option. In some cases, employers can arrange for a dedicated service allowing their employees to search for potential carpool partners among colleagues only, if they so desire. Some employers also establish their own internal ridematching systems, to maximize both employee uptake and corporate control.

Ridematching service providers typically include a liability waiver in commuter ridematching applications. The purpose of the waiver is to relieve any liability exposure that employers or service providers may experience when their intervention results in carpools that would not otherwise have formed.

## Vanpooling

Vanpools typically carry seven to 15 occupants in a vehicle owned by a third party, and are driven by one of the vanpool members. Because of the capital cost of a dedicated vehicle, and due to the extra effort to pick up and drop off passengers, vanpools tend to be most practical for long-distance commutes where public transit is not available. Public vanpooling services—a hybrid between public transit and carpools—are only offered (at the time of writing) by Jack Bell Ride-Share in British Columbia. Private, for-profit vanpooling services are offered in some other locations, and a small number of Canadian companies operate their own in-house vanpools to help employees get to work. Current legislation in some provinces does not permit third-party vanpool services.

## Preferential parking

At workplaces where parking lots are large or regularly fill to capacity, the provision of designated priority parking spaces for carpools can be an effective incentive for ridesharing. Discounted parking fees for carpools can also work, although carpoolers already benefit by dividing parking fees among themselves. Priority parking spaces that are highly attractive to eligible carpoolers are also highly attractive to ineligible users (i.e. solo drivers and visitors), and therefore they are subject to abuse. Commuters may police themselves effectively in smaller workplaces, but elsewhere a system to register eligible users and issue identification stickers or hangtags is highly recommended, as is regular monitoring and enforcement.

## User information

Especially when launching a new ridesharing initiative, it can be useful to remind employees about the ease and convenience of carpooling. Reassurance about the flexibility of individual carpooling arrangements, and communication about incentives or supportive policies at the workplace, can encourage commuters to give ridesharing a try. Reminders that a ridematching system is available should be made frequently.

## Special events

Annual events like the Environment Week in June and RideShare Week in the fall can provide the motivation for individuals to try carpooling for a limited time, which is often the first step to a longer-term arrangement. Corporate environmental fairs or similar events offer an opportunity to promote ridesharing and raise awareness of related services and incentives.

## Emergency (or guaranteed) ride home

An emergency ride home program offers assurance that carpool passengers will be able to get home quickly and conveniently in case of family emergency or unexpected overtime, and that carpool drivers can also do so without inconveniencing their passengers.

## Other support and incentives

In workplaces where different staff groups have varying core hours, flexible working hours allow commuters to search more widely for potential carpool partners.

Travel plans can include reward programs that let employees track their commuting activity. Ridesharers that accumulate a certain number of annual shared trips could be eligible for recognition or a prize of some type.

# 4.4 WALKING AND CYCLING

## Opportunities and challenges

Active commuting options like cycling, walking, jogging and in-line skating are particularly attractive for employees who live relatively close to work. Other supportive factors include a health-conscious workplace culture, active employee population, and workplace proximity to high-quality walking and cycling networks.

Common challenges to active commuting include a harsh climate (frequent wind, cold, rain and snow), employee concerns about personal safety and the potential for bicycle theft, and a lack of shower and change facilities in the workplace.

Another common obstacle to active commuting is the need for employees to bring their car to work so they can make local business trips during the day. Giving workers other options for local business travel (e.g. taxi chits, transit tickets, fleet cars or bicycles) makes walking and cycling more viable as ways of getting to and from work.

## On-site routes

On larger, busier sites like multi-building campuses, pedestrians and cyclists may have limited opportunities to safely travel along or across internal roads. The addition of sidewalks, pathways, marked crossings, stop signs and traffic calming features can create a safer and more supportive environment for active transportation.

## Change and shower facilities

Longer-distance cyclists, joggers and even walkers can need a place to shower and change at work. The absence of these facilities is a major barrier to the healthiest methods of commuting. The most attractive facilities include lockers for full-time or day-only use, hair dryers and an open space to dry out gear. Cyclists tend to need larger lockers to accommodate helmets, panniers and removable bike parts like lights and seats.

## Bicycle parking

Adequate, secure bicycle parking is a basic need of cycling commuters. Theft prevention is a major concern in some communities, especially in an era when commuters are increasingly willing to spend upwards of $1,000 for a quality bicycle. Racks should have a design that enables secure locking while preventing damage to wheels. They should offer weather protection, and be located within sight of busy areas such as main building entrances or staffed parking kiosks. Lockable outdoor bike cages or indoor storage rooms that limit access to registered users are ideal.

> HealthCommute provides a simple way for staff to think about commuting, saving money, reducing the parking crunch and on-site congestion, improving their health and conserving energy while benefiting the environment.
>
> Through face-to-face meetings and a dedicated internal Web page we are able to educate staff about the resources and options available to them, including transit guides, carpooling, bicycling and walking maps, telecommuting, flexible work week, staggered work shifts, valet parking, inter-hospital shuttle service and end-of-trip facilities—secured bike cage or racks for bicycles, clothes lockers and showers. Staff are able to save money, there is an undeniable positive impact on the local and global environment and Alberta Health Services is able to take steps to reduce the number of parking stalls required.
>
> *Franco Benacchio, Director, Business Operations, Alberta Health Services*

## Information and training

Potential commuter cyclists can be intimidated by the need to ride on major roads in congested rush-hour conditions. This barrier can be reduced or eliminated by offering cycling skills training (e.g. CAN-BIKE certification courses) to interested employees. Many communities publish printed and/or online maps that can help commuters identify the most convenient and comfortable walking or cycling routes from home to work. In communities where buses are equipped with bike racks, transit operators may offer to bring a rack-equipped bus to a worksite and let employees try loading and unloading a bike (overcoming worries about technical problems that can otherwise be a barrier).

## Bicycle user groups

Cyclists can form very supportive communities, and bicycle user groups (BUGs) are one example of this. Large workplaces or geographic areas with a concentration of cycling commuters are prime territory for BUGs, which can help members arrange group rides, share tips on bike maintenance, find cycling buddies, and help employers improve bike parking or shower and change facilities.

## Bicycle maintenance

Cycling commuters can experience maintenance issues that make the homeward trip difficult or impossible. Keeping a small supply of tools (e.g. air pump, allen keys, wrenches) and supplies (e.g. inner tube patches, chain lubricant) in the workplace can help. Identifying a volunteer employee skilled in bicycle maintenance can also help less knowledgeable cyclists deal with needed repairs.

## Special events

Events like the Bike to Work campaigns held in many communities or the national Commuter Challenge held every June can motivate recreational cyclists (or even non-cyclists) to try cycling to work, and can encourage others to try walking, jogging or in-line skating. Corporate environmental fairs or similar events offer an opportunity to promote active transportation and raise awareness of related services and incentives.

## Emergency (or guaranteed) ride home

An emergency ride home program offers assurance that active commuters will be able to get home quickly and conveniently in case of family emergency, unexpected overtime, or unexpectedly severe weather conditions.

## Other support and incentives

Just as many employers subsidize automobile users (through free parking), and a few employers subsidize transit commuters (through discounted transit passes), employers can provide financial incentives to active commuters. This may take the form of gift cards for sporting goods stores (which would be a taxable benefit).

Travel plans can include reward programs that let employees track their commuting activity. Cyclists, joggers or walkers that accumulate a certain number of active commutes or mileage threshold each year (e.g. 250 km by foot or 1,000 km by bicycle) could be eligible for recognition or a prize of some type.

Because the time at which the sun rises and sets varies dramatically throughout the year, flexible working hours may let active commuters travel at least one direction in daylight, either in the morning or the afternoon.

Other incentives for regular active commuters include "rainy day options" that give them (for example) a coupon for discounted parking one day each month.

# 4.5  DRIVING EFFICIENTLY

Even the most ambitious travel plan will recognize that not all commuters can leave their car at home. Including drivers in travel plan communications and activities will keep them engaged, and can contribute to overall travel plan goals.

## Driver education

There is a wealth of information to help drivers conserve fuel and reduce commuting costs. Federal, provincial and local programs (e.g. the Auto$mart initiative of Natural Resources Canada) offer Web sites, brochures and even training for drivers. The Canadian Automobile Association publishes an annual guide to the average cost of owning and operating a car that can help raise awareness among commuters of the true costs of car commuting.

## Special events

Displays of alternative-fuel vehicles can attract employees to transportation fairs held as part of a broader travel plan. Some governmental or non-governmental organizations also offer free emission or tire pressure checks at large workplaces.

## No-idling zones

Installation and enforcement of anti-idling signs in passenger drop-off and pick-up zones around building entrances can reinforce energy conservation messages, while protecting air quality in areas where people are waiting for their ride to arrive.

> Advanced Micro Devices (AMD) aims to reduce the environmental impacts associated with our employees commuting to work, which is why we are proud of our award-winning commuter benefits program, *Go* Green. The program enhances employee quality of life, reduces travel costs, and improves air quality through the use of alternative transportation.
>
> *Go* Green is centrally-operated and site-customized so that the 1,200+ registered AMDers can participate from over a dozen sites in Canada and the United States while accessing local commuter information and transportation-related incentives. These incentives include discounts to local bike shops for cycling to work, tax-free vouchers for using transit or vanpools, and preferred parking permits for carpooling.
>
> Our online site allows participants to customize their commute profile and search for alternative transportation options. Within minutes of registering, users can see a map of AMD carpools and bike buddies in their area as well as look up public transit schedules and cycling maps. Solo trips avoided by ride-sharing, telecommuting, cycling, or taking transit, are logged in the individual's "Commute Calendar" in order to track total cost savings and emission reductions.
>
> *Richard J. Conohan, Program Manager, Environmental Health and Safety, AMD*
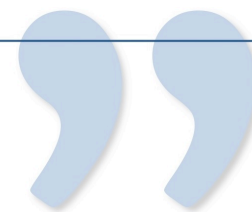
# 4.6 TELEWORKING

*Telework is a complex subject and difficult to address comprehensively in a concise guide like this one. However, the following paragraphs identify some basic considerations.*

Telework reflects the evolution of the Canadian workplace. By enabling employees to work outside a traditional office, telework (or telecommuting) helps them reduce or eliminate their need to commute. It can involve working from home, a satellite office, a third-party telework centre, or virtually anywhere else.

It is important to acknowledge the distinctions between casual or flexible telework (for which the employee continues to commute frequently, and maintains a personal workspace at the office) and full-time telework (for which the employee only travels to the workplace as needed, and may require only a shared or drop-in workspace). Full-time telework has more significant requirements and impacts for both the employer and employee.

Telework is not suited to all, or even most, employees and employers. Its role in a travel plan can be significant due to the potential for outright elimination of some commuting activity, but it can have great impacts on other aspects of business operations. For this reason, telework initiatives require the involvement of many different actors to ensure a full understanding of opportunities and challenges.

Employees and managers are both likely to have preconceptions about the advantages and disadvantages of telework. These views may strongly favour or disfavour telework as a practice, and may or may not be realistic. Consultation, education and training help ensure that everyone who is potentially affected by a telework initiative has a full and objective comprehension of the implications.

> A telework option provides us with a great tool for business continuity and offers the additional benefit of reducing our carbon footprint.
>
> *Alexia Vitaljic, Credential Financial Inc.*
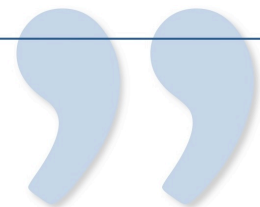
# 4.7 COMPRESSED WORK WEEKS

Compressed work weeks allow employees to work their required hours over fewer days (e.g. five days in four, or ten days in nine), eliminating the need to commute on certain days. Typical employee benefits include a better work-life balance and greater flexibility in scheduling personal appointments. Employer benefits include extended service hours and reduced parking demands if employees don't all take the same day off.

As part of a travel plan, compressed work weeks can eliminate 10 to 20 percent of commuting activity.

However, extended hours can make it hard for some employees to find carpool partners among those still working regular hours. Active commuters may find themselves travelling more frequently in darkness. Transit users may also find that longer hours leave them unable to take peak-period express buses, or that transit becomes challenging due to the extra travel time on top of the longer workday. The reduced number of commuting days each month can also make transit passes less competitive as a method of fare payment.

# 4.8 PARKING MANAGEMENT

## Opportunities and challenges

Proactively managing parking supply and demand can allow employers to create a valuable incentive for travel plan measures like carpooling and vanpooling, while creating a meaningful disincentive for driving.

However, parking management can be challenging in terms of employee relations. Employee acceptance will depend on factors including the corporate culture and the use of incentives to offset any disincentives. Suburban employees typically expect plentiful free parking, while downtown employees do not. It can be difficult (but not impossible) to win over employees to the idea of paid parking when parking is free at other nearby employers.

## Parking supply

Parking supply strategies to support travel plans require careful assessment. First, municipal zoning by-laws may require a certain amount of parking at workplaces. Second, parking reductions (by themselves) are unlikely to change behaviours and may only shift parking activity elsewhere. Instead, consider parking supply reductions as a follow-up to incentives that have successfully reduced parking demand and created excess capacity that can be removed without upsetting employees.

## Parking price

Charging commuters for parking is an effective way of getting drivers to consider their options. However, employers that start charging for previously free parking can face internal controversy and negative feedback. Some employees may be more accepting of parking charges as part of a travel plan if the revenues are used to fund incentives such as new showers and change rooms, improved bicycle parking or subsidized transit passes.

The idea of a transportation allowance, as discussed in **SECTION 3.1.4**, is an alternative to charging for parking. A monthly or annual allowance for non-driving employees effectively gives drivers an incentive to choose a different method of commuting. The allowance for non-drivers would be a taxable benefit under current Canadian law. (Note that in the United States, favourable tax treatments of travel allowances have led to a practice known as "parking cash-out" whereby a non-taxable allowance equivalent to a new parking fee is given to all employees, not just to non-drivers. In Canada, tax legislation would require drivers to be taxed on this allowance—making this approach less attractive for employers and driving employees than a simple travel allowance for non-drivers.)

# 4.9 BUSINESS-RELATED TRAVEL

Your travel plan should not consider commuting activity in isolation of other transportation activity at the workplace. This applies both to the consideration of needs and benefits, and to the development of travel plan measures. There are important relationships among commuting, local business travel and (to a lesser extent) travel by visitors and clients. Among them is the fact that when employees are given an alternative to using private cars for local business travel during the workday, they become free to commute in the way that works best for them.

## Walking and cycling

Depending on the distance to key destinations and the walking and cycling environment around your workplace, employees may find active transportation to be a convenient and enjoyable way to make short business trips. They can also reduce employer expenses by avoiding mileage reimbursements and parking costs, although they may require extra travel time. The provision of pool bicycles, or membership in a shared bike system, makes cycling practical even for commuters who travel to work by car or transit.

## Public transit

Depending on location of your workplace and common workday destinations, and on the quality of transit service that connects them, public transit can be remarkably convenient and inexpensive compared to personal vehicle use (considering reimbursements for mileage and parking, and the time lost to congestion). Making transit tickets or transferable transit passes available to employees for business travel can eliminate the paperwork involved in reimbursing them for transit fares.

## Ridesharing

When multiple employees attend the same off-site meeting or event, they can be reminded to carpool whenever possible.

## Taxis

The benefits of taxi use include reduced parking costs, reduced wear and tear on personal or fleet vehicles, and elimination of collision liability concerns. Some taxi companies can provide taxi chits to employers, which eliminate cash transactions and avoid the need to reimburse employees for each taxi trip they make.

## Fleet vehicles

The use of fleet vehicles for local business travel, rather than reimbursing individuals for mileage costs, can be a cost-effective approach depending on the volume of travel that occurs. Many organizations have existing fleets for specialized job functions that could be adapted or expanded for use by other employees.

The environmental impacts of fleet use can be reduced by training drivers to operate vehicles efficiently (a service offered through a number of governmental and non-governmental programs), and by providing fleet vehicles that are well maintained and energy-efficient.

## Interoffice shuttles

Employers with multiple worksites in the same region could provide an interoffice shuttle that, depending on the volume of travel from site to site, can be cost-effective particularly when combined with an interoffice courier function.

## Car sharing

Car sharing is a short-term, third-party, pay-per-use service that offers an alternative to direct car ownership. Car sharing services generally target the general public, although many offer attractive business memberships as an alternative to corporate fleets. For workplaces, car sharing's advantages include 24-hour access, self-serve reservation systems, itemized monthly billings, and outsourcing of all financing, insurance, maintenance and administrative responsibilities.

> It's like having our own fleet, but paying only for what we use. Each car sharing vehicle removes something like 15 privately-owned vehicles from the road. We would absolutely recommend The Company Car to other business organizations.
>
> *Lorien Henson, Founder and Creative Director, LimeLight Event Marketing*
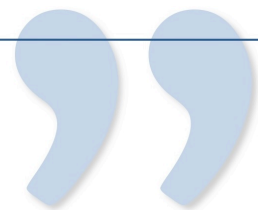
## Teleconferencing

Teleconferencing includes both telephone and Internet-based meetings with audio and video connections. It cannot replace all meetings, but can save time and money while increasing productivity and offering environmental benefits.

## Visitor and client travel

Travel plans can expand their benefits by considering visitor and client travel in addition to employee travel. For example, transit users can be helped through information sheets or signs showing which transit routes serve your workplace and how to reach nearby transit stops or stations. Visitors and clients who walk or bicycle to your worksite can also benefit from secure and easy-to-find bicycle parking, and improved on-site

routes for walking and cycling. Event invitations and advertising that offer driving and parking instructions can include information on how to reach the workplace by transit and active transportation.

Parking measures intended to influence commuting activity as part of a travel plan can become more complicated when visitor parking is also affected. Consider whether separation or signage of visitor parking is required to protect visitor spaces from use by employees, or to exempt visitors from parking charges paid by employees.

# RESOURCES

## ACT Canada

**www.actcanada.com**

ACT Canada is a clearinghouse for information on workplace travel planning in Canada. It offers:

- Links to service providers in Canadian communities that can help employers plan and implement workplace travel plans

- Information and resources for special events including the annual RideShare week

- Notice of upcoming learning events including ACT Canada's annual TDM Summit, a multi-day conference on travel planning and other aspects of sustainable transportation

- Networking with travel planning professionals across Canada

- Research reports and guidance for practitioners

## Transport Canada

**www.tc.gc.ca/urban**

Transport Canada's urban transportation programs group offers a range of resources and assistance:

- Access to *Commuter Options: The Complete Guide for Canadian Employers*, a comprehensive reference on workplace travel planning that acts as an excellent supplement to this guide

- Information on measuring the impacts of transportation demand management initiatives including workplace travel plans

- Case studies on innovative sustainable transportation practices across Canada

- Links to relevant governmental and non-governmental organizations and the resources they provide