

# SMBC Travel Planning Guidance for Developers

Travel Plan Guidance for Commercial  
Developments

SMBC

April 2024

Commercial Workplace Developments



# Notice

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This document has 12 pages including the cover.

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## What is a Commercial Travel Plan?

A Commercial Travel Plan (CTP) is a document which highlights a package of practical measures outlining how a workplace or organisation will promote sustainable modes of travel to anyone travelling to or from the site (including employees, visitors, customers and any other regular attendees) and encourage them to use sustainable transport options.

CTPs should set out the current position, the desired outcomes and the method(s) by which the desired result will be realised. They should also be reviewed on a regular basis.

CTPs have become an essential tool for the delivery of national, regional and local transport policy, and are important within the planning process, where they can be critical to the acceptability of a development proposal.

This document is tailored towards providing Travel Plan Guidance for Commercial/Business developments within Solihull Borough. This supplementary guidance document for producing CTPs should also be read in conjunction with the overarching Master Travel Plan Guidance Document also produced by Solihull Metropolitan Borough Council (SMBC), available here: <https://www.solihull.gov.uk/Planning-and-building-control/Other-planning-policy-documents>.

## Why are we Promoting Commercial Travel Plans?

CTPs can reduce the transport impacts of medium to large commercial developments by facilitating trip reduction through the provision and encouragement of alternative travel modes to single occupancy private cars. Individuals are most likely to change travel habits when moving home or employment location. New and expanding developments are therefore a prime opportunity to connect with, influence and inform the public towards adopting sustainable practices.

CTPs are a key means of achieving improved accessibility for everyone and will help to make the communities within Solihull Borough more sustainable and socially inclusive. CTPs can be used to ensure that infrastructure and transport services are provided as part of a development, so that the travel requirements of occupiers and visitors to the site can be met. Benefits of a CTP include:

- Improving site access and travel choice;
- Reducing congestion and demand for parking spaces;
- Providing opportunities for active travel;
- Meeting an organisation's environmental and corporate social responsibility policies and practices;
- Delivering local environmental improvements from reduced congestion, pollution and noise;
- Ensuring adequate provision for people with disabilities;
- Increasing accessibility; and
- Reducing adverse traffic impacts of developments.

## When should a Commercial Travel Plan be submitted?

We encourage all commercial businesses to develop a CTP, regardless of whether it is required for a planning application. In many cases, a CTP will be required as part of a planning condition, however, many businesses choose to prepare their own CTP, for example to avoid problems associated with congestion and parking.

A CTP should be produced for all new commercial developments that have the potential to generate significant levels of travel, either in the length or number of journeys involved. A CTP may also be required for extensions or for change of use of existing premises.

Please refer to the Refer to Section 2.4 of the Master Travel Plan Guidance Document for development thresholds to understand if this impacts you. Additionally, Travel Plans for education sites are covered separately in the School Travel Plan guidance document.

## Types of development suitable for Commercial Travel Plans

A CTP will be required for medium to large developments which fall within the following categories:

- Office premises and workplaces in general;
- Industrial premises;
- Hotels and buildings used for lodging;

- Shops and food and drink retail;
- Leisure facilities; and
- Public Houses, takeaway outlets, cinemas, etc.

## What should a Commercial Travel Plan include?

A CTP should establish a structured strategy for encouraging sustainable travel or reducing the need to travel. In short, the key sections to include in a CTP are:

- Introduction and scope of the document;
- Travel survey data;
- Strategy, aims, objectives and targets;
- Measures, action plan and budget; and
- Monitoring and review.

The key considerations for CTPs are discussed in more detail in the following sections; however, please also refer to the overarching Travel Plan Guidance Document for further details on what a CTP should include.

## Suggested measures for a Commercial Travel Plan

Figure 1 includes a package of suggested travel planning measures that are suitable to include within a CTP. They include:

**Figure 1 – Suggested measures for inclusion in a Commercial Travel Plan**



## Responsibilities of implementing and monitoring the Commercial Travel Plan

### Implementation

The CTP is implemented by a Travel Plan Coordinator, who will have responsibility for overseeing the application of the CTP document. A nominated Travel Plan Coordinator is a requirement of the CTP document, and their name/s must be supplied to SMBC planning officers. The post needs to be of sufficient seniority to undertake the tasks associated with implementing the CTP.

### Financial securities that are sought from owners/developers

Any CTP requires funding in order to be effective. This can be used to facilitate the implementation of the CTP, and the initiatives included in the plan on behalf of the owner/occupier. The funding is also required to cover the monitoring of outcomes and reporting back to SMBC on progress towards the agreed targets.

In the case of CTP, the responsibility lies with the developer/ site owner/ third party appointed by the developer to deliver the measures identified in the CTP and achieve the targets agreed with SMBC. In order to protect SMBC against failure to implement the agreed Travel Plan, SMBC will secure fees, in the form of a bond / cash deposit, from the developer / owner for a Travel Plan Fund. This bond / cash deposit will be returned on successful delivery of measures and completion of agreed targets within the CTP.

Should the developer / owner fail to deliver the CTP and meet the agreed targets, then SMBC will use the bond / cash deposit to implement Travel Plan measures on behalf of the developer / owner. The developer/ owner/ occupier/ should apply reasonable endeavours not to obstruct SMBC or a third party appointed to access the business site to deliver marketing and promotional initiatives in relation to the CTP.

### Can SMBC assist with the implementation of my Commercial Travel Plan?

For developments that are required to submit a CTP, SMBC can take responsibility for the implementation of Travel Plan measures if the developer wishes.

SMBC can implement the CTP, this will be sought as a Travel Plan contribution and will be commensurate to the value outlined in Appendix 1 Travel Plan fees for Commercial Developments and will be agreed with the Sustainable Travel Team at pre application stage.

### Monitoring of Commercial Travel Plans

A commitment to the monitoring and review of the CTP will provide the opportunity to quantify and demonstrate the extent by which the objectives and targets are being met. A successful, routine review process will also allow opportunities to make changes to the agreed outcomes to ensure they are sustained in the long-term.

Unless otherwise agreed with SMBC, a CTP required through the planning process must be reviewed and updated annually for the first five years following occupation and bi-annually thereafter.

Unless otherwise agreed, it will be the responsibility of the owner and occupier to produce, amend, implement and monitor the CTP and the responsibility of SMBC to advise and review the document where appropriate.

Effective monitoring of CTPs is essential in order to ensure the collection of consistent and robust data which will enable local authority officers, developers and occupiers to:

- Monitor progress in achieving the CTP's targets and identify refinements to be made to a plan that is not on course for achieving these; and
- Assess the effectiveness of the CTP and the specific measures implemented as part of the CTP for encouraging sustainable travel.

Either annually, or at a frequency agreed within the CTP, a progress report should be submitted to the local authority by the owner/occupier. This concise report should include a summary of any measures implemented, the travel survey results with comparison to previous surveys and travel plan targets, and an updated action plan including revised targets if necessary.

Baseline surveys will be undertaken, usually within six months of first occupation or at 50% occupancy, whichever is earlier. Follow up travel surveys to be carried out in years one, three and five.

In cases where a site is being developed in phases, the baseline survey should occur at a time when a significant proportion of each phase is occupied, and the trigger point should be agreed with the local authority and specified in the travel plan and section 106 agreement (where necessary).

## Schedule of Travel Plan fees

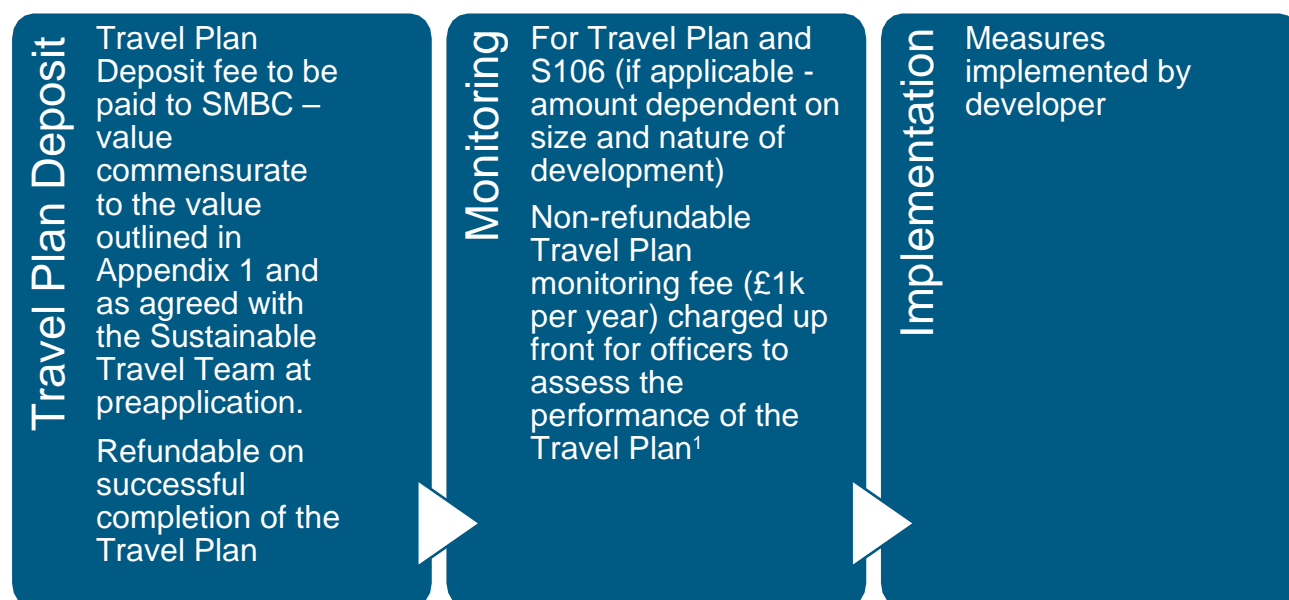
Monitoring fees will be dependent on the length of the monitoring period set<sup>1</sup> and the complexity of both the site and the monitoring requirements. As an approximate guide, SMBC bases the figure on approximately £1,000 per annum, which funds SMBC Officers' time to:

- Assess the Travel Plan's compliance;
- Review submitted reports;
- Record and review figures and targets;
- Advise coordinators.

Monitoring fees will be charged in addition to the Travel Plan deposit/contribution sought by SMBC. Figures 2 and 3 outline the associated fee schedules for CTP delivery:

**Figure 2 – Travel Plan Fee Schedule Option 1 (Measures implemented by Developer)**

The developer/owner is responsible for funding and implementing the CTP, incentives, the appointment of a travel plan coordinator etc. This will require a travel plan deposit, repayable on the successful implementation of the travel plan.

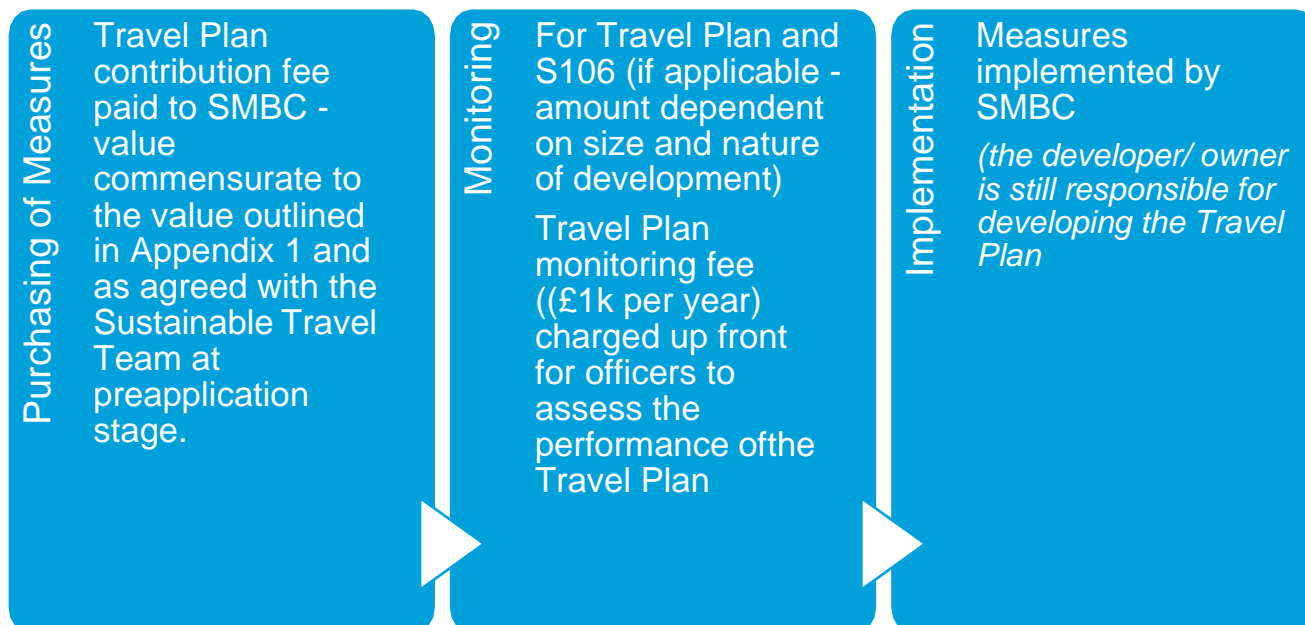


<sup>1</sup> Usually a minimum of 5 years but can be up to 10 years depending upon the nature, scale and transport impact of the specific development



**Figure 3 - Travel Plan Fee Schedule Option 2 – (Measures implemented by SMBC)**

SMBC would absorb all risk and will be responsible in regard to the delivery of the CTP. It is still the developer/owner's responsibility to produce the CTP. This option requires a non-refundable travel plan contribution on behalf of the developer, with a 20% premium to cover the additional risk the council incurs.



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