

Solihull Travel Planning Guidance for Developers in Solihull

Travel Planning Guidance for Developers

Solihull Metropolitan Borough Council (SMBC)

December 2022

Master Guidance Document



Notice

This document and its contents have been prepared and are intended solely as information for Solihull Metropolitan Borough Council (SMBC) and use in relation to Solihull Travel Planning Guidance.

Atkins Limited assumes no responsibility to any other party in respect of or arising out of or in connection with this document and/or its contents.

This document has 38 pages including the cover.

Document history

Document title: Travel Planning Guidance for Developers

Document reference: Master Guidance

Revision	Purpose description	Originated	Checked	Reviewed	Authorised	Date
Rev 5.0	Draft for Engagement	ML	RA	RE	RE	26/03/2021
Rev 6.0	Final Version following Second Engagement	RA	ML	RE	RE	20/05/2021

Client signoff

Client	Solihull Metropolitan Borough Council (SMBC)
Project	Solihull Travel Planning Guidance for Developers in Solihull
Job number	5204421
Client signature/date	

Contents

Chapter	Page
Glossary	5
1. Introduction	6
1.1. Purpose of the document	6
1.2. Why has it been produced?	6
1.3. How has this been produced?	6
1.4. Structure of the document	8
2. Travel Plan Overview	9
2.1. What is a Travel Plan and what are the benefits?	9
2.2. Why is a Travel Plan necessary?	9
2.3. What types of Travel Plan are there?	9
2.4. How do I know which Travel Plan applies to me?	10
2.5. How do Travel Plans fit in to the wider planning process?	11
2.6. When should I produce a Travel Plan?	12
2.7. How are Travel Plans secured legally by the planning authority?	13
2.8. Can a Community Infrastructure Levy be used to secure travel planning measures?	13
2.9. What are the fees associated with Travel Plans? Why are they charged in addition to S106 Monitoring Fees?	14
2.10. What are the responsibilities of developing and monitoring the Travel Plan?	15
2.11. How is a Travel Plan assessed?	15
2.12. How is Travel Plan implementation managed?	16
2.13. What is Modeshift STARS and how can it help me develop and monitor a Travel Plan?	16
3. Travel Plan Content	17
3.1. Required content of a Travel Plan	17
3.2. Framework Travel Plans	18
3.3. Travel Surveys	18
3.4. Setting Travel Plan Targets and Objectives	18
3.5. Travel plan measures to be considered	19
4. Monitoring of Travel Plans	21
4.1. Failure to deliver agreed travel plan targets and measures	21
5. Contact Details	22
Appendices	23
Appendix A. Policy Guidance Overview	24
Appendix B. Planning Obligations and Conditions for Travel Plans	28
B.1. Are planning obligations or conditions more suitable for the development in question?	28
B.2. What should be included in S106 agreements in relation to the Travel Plan?	28
B.3. S106 Travel Plan Clauses	29
B.4. Planning Conditions	31
Appendix C. Checklist for Applications	33
C.1. Schools	33
C.2. Residential (Interim)	34
C.3. Residential (Full)	35
C.4. Workplace (Interim)	36
C.5. Workplace (Full)	37

Tables

Table 2-1 - Types of Travel Plan	9
Table 2-2 - Development Scale Guidelines for Travel Plan Requirements (Using DfT Updated Land Use Classes, 2020*)	10
Table 2-3 - Travel Plan Requirements at Scoping and Pre-Application Stages	12
Table 2-4 – Legal Tests for Planning Obligations	13
Table 2-5 – Legal Tests for Planning Conditions	13
Table 3-1 - Content for Policy Compliant Travel Plan	17

Figures

Figure 2-1 - Securing Planning Permission Pathways	11
Figure 2-2 - Scoping Discussions	12
Figure 3 -1 - Measures for consideration for inclusion in a Full or Framework Travel Plan	20

Glossary

Acronym	Definition
CTMP	Construction Traffic Management Plan
CTP	Construction Travel Plan
NPPF	National Planning Policy Framework
S106	Section 106
SMBC	Solihull Metropolitan Borough Council
SOV	Single Occupancy Vehicle
SPD	Supplementary Planning Document
TA	Transport Assessment
TP	Travel Plan
TS	Transport Statement

1. Introduction

1.1. Purpose of the document

This document has been issued by Solihull Metropolitan Borough Council (SMBC), which provides detailed guidance for developers on their requirements to promote travel demand management as part of development proposals. This is implemented through a Travel Plan (TP), supported by a Transport Assessment (TA) or Transport Statement (TS) submitted as part of the planning application. This document serves as a guide for developers and other stakeholders through the Travel Plan process and to promote consistency and best practice in travel planning across Solihull.

In addition to this Master Guidance document, separate advice on specific types of Travel Plans relating to certain land uses, including residential, business and education, is provided. These set out detailed guidance for developers on the requirements to promote travel demand management as part of those particular types of development proposals.

Please note that this guidance covers TPs only. Please refer to the New Housing in Context Supplementary Planning Document issued by SMBC and the National Planning Policy Framework (NPPF) for guidance on developing TAs and TSs. Please also consult SMBC's Development Management Team during pre-application discussions.

This document was formally adopted as a Supplementary Planning Document (SPD) on the 9th January 2023 and should be consulted in conjunction with SMBC's Adopted Local Plan.

1.2. Why has it been produced?

The aforementioned documents are essential to supporting a development proposal through the planning application process. It is a planning requirement to carry out a detailed assessment of the impact which a development will have on the surrounding highways and transportation network. Demand management strategies will then be required to minimise the anticipated impact of the proposed development on the transport system.

This is outlined in the Solihull Local Plan under **Policy P8: Managing Travel Demand and Reducing Congestion**:

Policy P8 Managing Travel Demand and Reducing Congestion - *The Council will require Transport Assessments and/or Travel Plans to accompany planning applications that include proposals which may generate significant traffic volumes, situated in traffic-sensitive locations or otherwise likely to have a significant impact on the highway network.*

. The Council will secure S106/278 or utilise CIL contributions as appropriate to secure the necessary measures required to ensure the highway impacts of new development are mitigated and support the principles of sustainable development. This will include contributions towards the ongoing management of travel plans.

This also reflects national planning guidance in the NPPF, which states that any development generating a significant amount of traffic movement requires a TP.

All relevant national and local policy is included in **Appendix A**.

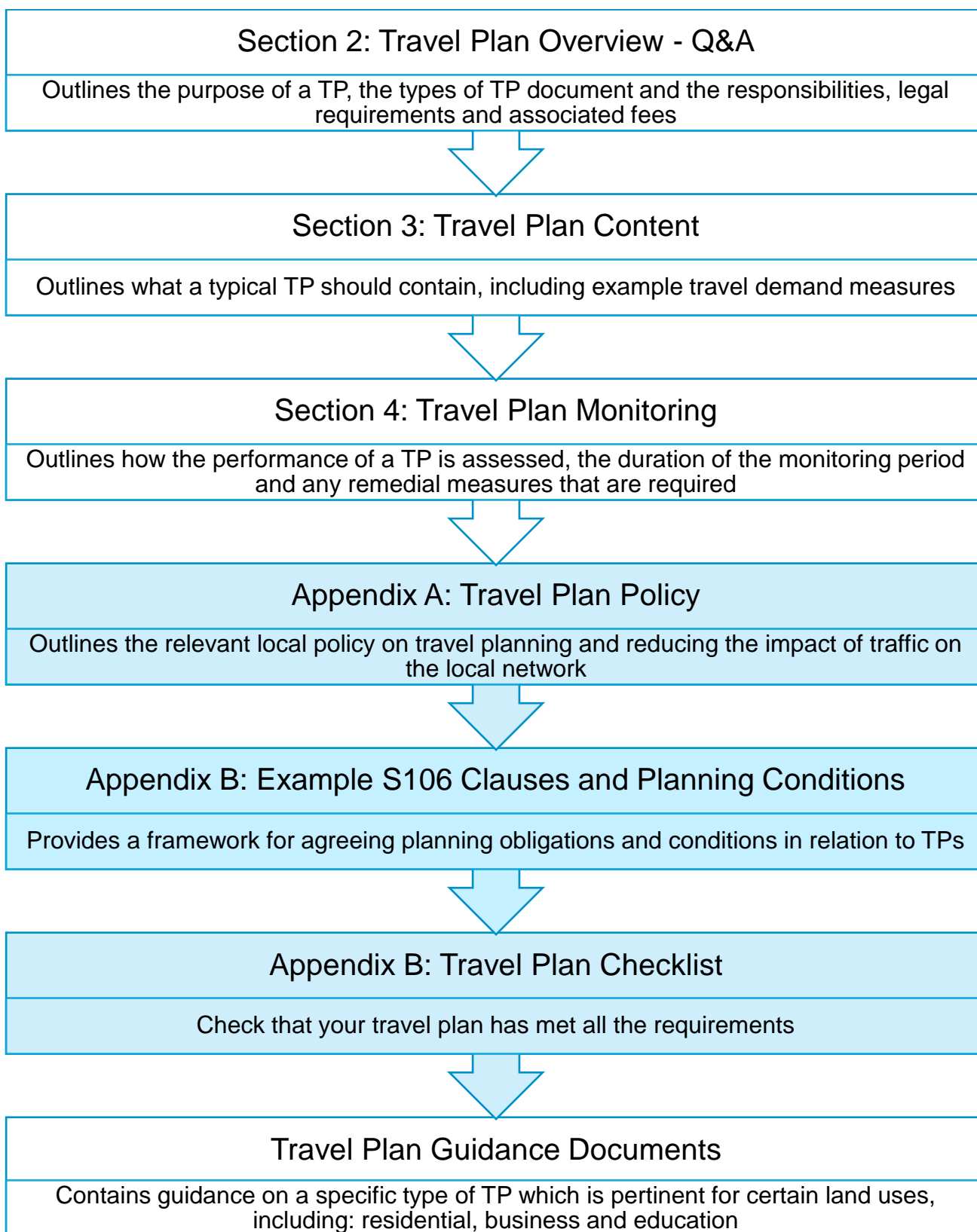
This document also will ensure that the appropriate developer contributions – through Section 106 (S106) Agreements – or planning conditions are secured and that the correct procedures are followed to ensure the successful implementation of the TP.

1.3. How has this been produced?

1. Draft TP Master Guidance Document and separate guidance documents for specific land uses developed
2. Engagement with SMBC's Places, Managed Growth and Communities, and Economy and Infrastructure Directorates
3. Final Version Submitted and received Cabinet approval

4. SPD Consultation
5. Adopted by SMBC, the local planning authority

1.4. Structure of the document



2. Travel Plan Overview

2.1. What is a Travel Plan and what are the benefits?

A TP is a package of measures or agreed outcomes aimed at reducing reliance on the private car and maximising the opportunities for sustainable travel modes to reduce congestion and improve the accessibility of a development site. A TP is a process rather than a policy document and a successful TP requires management, continuous monitoring, review and improvement over time.

A TP can deliver a number of benefits to a new or expanded development, as follows:

- Less congestion and therefore improved safety on local roads by promoting alternatives to the car;
- Reduced highway capacity problems by promoting sustainable travel choices;
- Local environmental improvements from reduced congestion, carbon emissions, pollution, and noise, making the site more attractive to potential occupiers/users;
- Increased opportunities for active healthy travel (walking and cycling);
- Reduced demand for car parking spaces, enabling land to be put to more cost effective or commercially beneficial use and freeing space for active travel initiatives;
- Improved travel choice, quality, and affordable access to services for all users; and
- Increased opportunities for employers to feed into corporate social responsibility or sustainability initiatives.

2.2. Why is a Travel Plan necessary?

Along with TA/TSSs, TPs are an essential part of the planning process to ensure the transport impacts arising from a development are acceptable. It is a key mechanism for ensuring your development does not produce significant impacts on the local highway network and sustainable travel is encouraged.

Supported by the following local policy:

- National Planning Policy Framework (2012)
- Solihull Local Plan - Adopted (December 2013) and Draft Submission Local Plan Review (October 2020)
- Vehicle Parking Standards and Travel Plans (2006)
- Solihull Connected 2016-2036
- Solihull Clean Air Strategy 2019-2024
- Solihull Council Plan 2020-2025
- Solihull's Climate Change Prospectus 2020/21
- Solihull Town Centre Masterplan
- Solihull Walking/Cycling Strategy (2021)
- Adopted Neighbourhood Plans

2.3. What types of Travel Plan are there?

Policy details are provided in **Appendix A.**

The main types of TP are outlined in Table 2-1 below:

Table 2-1 - Types of Travel Plan

	Description
Full Travel Plan	Required for significant developments which meet or exceed development thresholds in Section 2.4. These should include all the content outlined in Section 3.
Framework Travel Plan	A TP which includes provisional targets and measures, only in the following circumstances: the developer is unsure of the ultimate occupier, there is insufficient background information and/or the development is at outline planning stage and the scale of use is unknown. A full updated TP will be required from the developer up to 6 months upon first occupation; this will be secured via a planning condition to support a planning application. Framework TPs also cover multi-occupier commercial sites that sets out the overarching targets and measures for the whole site, as well as the requirements for subsidiary travel plans from individual occupiers.
Travel Plan Statement	Required for smaller developments that fall below the full TP thresholds, but which typically employ 20 or more employees or comprise of over 50 residential units. It should include as a

minimum a set of positive measures promoting sustainable transport, together with an action plan for their implementation.

2.4. How do I know which Travel Plan applies to me?

TPs are required for developments which generate significant traffic movements, defined by the development scale thresholds presented in **Table 2-2**¹. This requirement applies to both new developments and the extension of existing sites.

Table 2-2 - Development Scale Guidelines for Travel Plan Requirements (Using DfT Updated Land Use Classes, 2020*)

Land Use	Travel Plan Statement	Full or Framework Travel Plan
B2 (Industrial)	More than 20 staff but less than 2,500sqm	Equal or more than 2,500sqm
B8 (Warehouse and Distribution)	More than 20 staff but less than 5,000sqm	Equal or more than 5,000sqm
C1 (Hotels)	More than 20 staff but less than 100 beds	Equal or more than 100 beds
C3 (Residential)	Between 50 and 80 units	Equal or more than 80 units
E(a) Retail (excluding hot food)	More than 20 staff but less than 1,000sqm	Equal or more than 1,000sqm
E(b) Food and Drink (consumption on premises)	More than 20 staff but less than 750sqm	Equal or more than 750sqm
E(c) Financial and Professional Services	More than 20 staff but less than 1,000sqm	Equal or more than 1,000sqm
E(d) Indoor Sport and Recreation	More than 20 staff but less than 1,000sqm	Equal or more than 1,000sqm
E(e) Medical or Health Services	Between 20 and 50 staff	Equal or more than 50 staff
E(f) Preschool Education Facilities	To be determined on scheme by scheme basis.	
E(g) Other business/service which can be carried out in residential areas		
F1(a) Provision of Education	All new school developments to have a TP, or where classroom capacity is increased significantly at existing education sites	
F1(b-g) Learning and Non-residential Institutions	More than 20 staff but less than 2,500sqm	Equal or more than 2,500sqm
F2 Local Community	To be determined on scheme by scheme basis.	
Sui Generis uses	To be determined on scheme by scheme basis. All student accommodation over 100 beds should have a Full TP.	

*Available at: https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

TPs may also be required in specific circumstances for developments below the thresholds shown, for example:

- Where the proposed development has the potential for significant traffic impact which requires mitigation or has accessibility issues to be addressed;

¹ Please note that development thresholds have been applied to new classes in line with previous guidance issued by the DfT. These will be updated accordingly with any updates provided by the DfT

- Mixed-use developments where each individual land use may not reach these thresholds but in combination will have a significant impact, or to developments that may generate a high number of visitor trips;
- For phased developments where the initial phasing may not reach the specified threshold, but future development phases will reach/exceed the threshold;
- For applications for extensions or other proposals, where the proposal itself does not reach the threshold but where the combined existing and proposed development meets or exceeds the threshold; or
- Developments that do not meet the thresholds, but which are likely to have adverse effect on sensitive locations and could exacerbate congestion, air quality, amenity, and road safety problems. Examples include:
 - Conservation areas, which are listed here: <https://www.solihull.gov.uk/Planning-and-building-control/Conservation-areas>
 - The A45 between M42 Junction 6 and the B4438. SMBC has received a ministerial direction in relation to air quality at this location, due to exceedance of NO₂ concentrations

Where any of these categories are met, SMBC will enter into discussions with the developer.

2.5. How do Travel Plans fit in to the wider planning process?

It is a planning requirement to carry out a detailed assessment of the impact which a development will have on the surrounding highways and transportation network. This is covered by a TA or TS. TAs will be required for developments which generate significant additional trips on the transport network, in line with local guidance. A TS provides a less comprehensive analysis of the impact of smaller developments on the highway network. Construction Traffic Management Plans (CTMP) are also required where a development is expected to generate a significant volume of construction vehicles.

The purpose of your TP is to lay out the demand management strategies that will then be required to minimise the anticipated impact of the proposed development on the transport system. A TP should be submitted with the TA. This should therefore be considered at the preapplication stage.

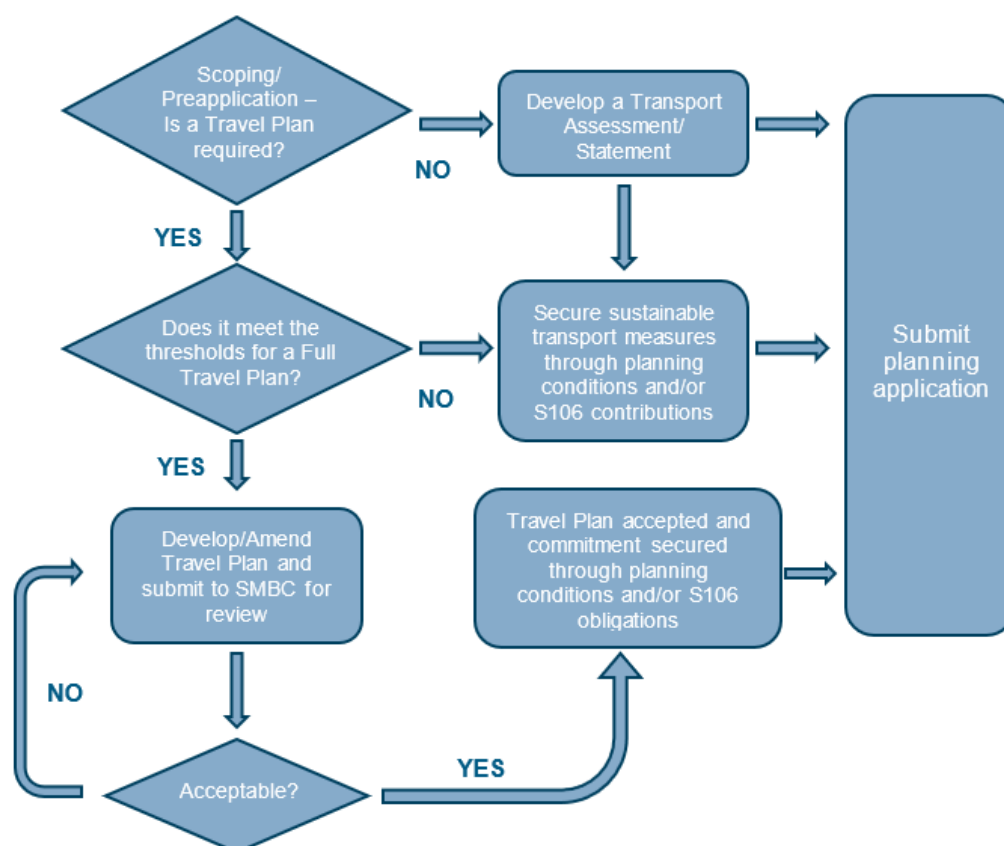


Figure 2-1 - Securing Planning Permission Pathways

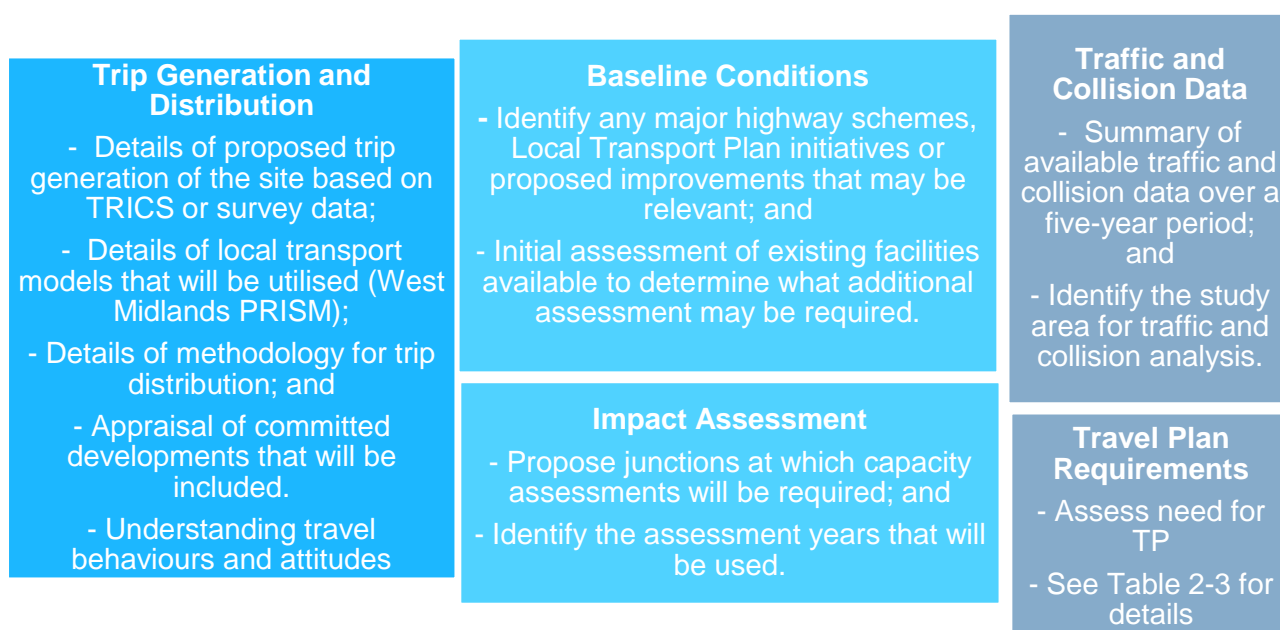
2.6. When should I produce a Travel Plan?

Table 2-2 in Section 2.4 provides the development threshold for where a TP is required, however there might be special cases where a TP is required even if those thresholds are not met. It is essential that TP requirements for your development are agreed with SMBC's Development Management Team, alongside the discussion of requirements for a TA or TS. It is recommended that developers consult these thresholds in the scoping stage to understand the local requirements for a TP.

It is considered best practice to discuss the development site's requirements and proposed methodology with SMBC's Development Management Team as soon as possible through the preparation of a transport scoping report. It is recommended that the Sustainable Travel Team are also consulted during scoping discussions to discuss the need for a TP.

The scoping discussions to be held with SMBC should focus on the following:

Figure 2-2 - Scoping Discussions



Where applicable, SMBC will request a Framework TP from the developer at the pre-application stage. SMBC will conduct a review and provide comments on the TP if one is submitted. Alternatively, a TP will be requested by a planning condition, in which case your TP will be submitted as part of the formal planning application.

The following table shows what should be considered in terms of travel planning at the early stages of the planning process.

Table 2-3 - Travel Plan Requirements at Scoping and Pre-Application Stages

Stage	Requirement
Scoping	<ul style="list-style-type: none"> • Establish the requirement for a TP or, for a smaller development, suitable TP measures • Applicant and SMBC agree the type of TP required and how this will be integrated with the overall highway mitigation package identified through the TA • Applicant agrees the requirements for the TP with Local Planning and Transport Authority
Pre-application	<ul style="list-style-type: none"> • Applicant submits Framework TP to SMBC to evaluate the TP and make comments • SMBC gives feedback to the applicant enabling review and assessment of the TP • Applicants undertake informal consultation on the proposed application • Applicant and SMBC undertake negotiations • SMBC and applicant agree draft terms of legal agreement and conditions

2.7. How are Travel Plans secured legally by the planning authority?

There are two mechanisms for securing TPs:

1. TPs are ideally secured via Section 106 (S106) agreements (a legal document, executed as a deed, made pursuant to Section 106 of the Town and Country Planning Act 1990). Obligations are a statutory tool to mitigate the impact of a development; they are also used to secure financial contributions for the implementation and/or monitoring of a TP. To be implemented, planning obligations they must pass three legal tests. Current legislation is included in the Community Infrastructure Levy Regulations (CILR) 2010:

Table 2-4 – Legal Tests for Planning Obligations

Necessary to make the proposed development acceptable in planning terms	The TP will help reduce the number of car trips generated by the development that would be expected if each occupier did not use walking, cycling, motorcycling or public transport for some journeys.
Directly related to the proposed development	A TP will cover all those journeys made by people travelling to/from the development.
Fairly and reasonably related in scale and kind to the development	Contributions in relation to a TP are not excessive in comparison with other costs. The plan will ensure the TP measures are implemented by the developer and monitored in order to measure effectiveness.

2. Where appropriate, a planning condition can also be used to secure a TP. The condition needs to ensure that the TP will be implemented and monitored. As laid out in Paragraph 55 of the NPPF, planning conditions should only be used where they satisfy the following tests:

Table 2-5 – Legal Tests for Planning Conditions

Necessary to make the proposed development acceptable in planning terms	A TP will potentially help reduce car trips and result in greater use of public transport and walking, cycling and motorcycling facilities provided for the development.
Relevant to planning	A TP will benefit occupants of the development in the future by reducing car journeys generated by the development.
Directly related to the proposed development	A TP will cover all those journeys made by people travelling to/from the development.
Fairly and reasonably related in scale and kind to the proposed development	Contributions in relation to a TP are not excessive in comparison with other costs. The plan will ensure the TP measures are implemented by the developer and monitored in order to measure effectiveness.
Reasonable in all other respects	It is reasonable to expect the developer to provide facilities related to the developments that mitigate the effect of the development on the highway network. A TP will potentially help reduce car trips and result in greater use of public transport and walking and cycling facilities provided for the development.

2.7.1. Use of planning obligations and conditions

The right balance needs to be struck between the use of planning obligations and conditions. SMBC will take a measured approach to ensure the development remains viable; all requirements for TPs and TP financial contributions will be proportionate and in accordance with the CILR, NPPF and the adopted Local Plan.

Whether a condition or an obligation is used to secure your TP will depend on the location, type and scale of development and the planning or transportation context. By discussing TPs at the scoping stage and agreeing the overall approach to be taken with planning officers in the initial stages, this will make the process of developing and agreeing obligations and conditions as efficient and smooth as possible.

More information on the use of planning obligations and conditions are included in **Appendix B, including example S106 Clauses and Planning Conditions**. Alternatively, planning officers can refer to RObUST (Reliable Obligations Used for S106 Travel plans), an online tool developed by WestTrans for local authorities to review and select from a comprehensive list TP clauses and legal definitions: <http://robust.westtrans.org/>

Further Government guidance on the use of planning conditions can be found here: <https://www.gov.uk/guidance/use-of-planning-conditions>.

Refer to Appendix B for more details on the use of Planning Obligations and Planning Conditions

2.8. Can a Community Infrastructure Levy be used to secure travel planning measures?

In limited circumstances, funding for travel plan measures can be obtained through a Community Infrastructure Levy. This is a tariff charged to developers, to fund transport and other infrastructure needs arising from new development. This is captured under the Regulation 123 List of the Community Infrastructure Levy Regulations 2010, which captures infrastructure and travel planning measures to improve access to Solihull Town Centre.

Please refer to the current Infrastructure Funding Statement, which is available on SMBC's website, for further details.

2.9. What are the fees associated with Travel Plans? Why are they charged in addition to S106 Monitoring Fees?

2.9.1. S106 Monitoring Fees

Note that Travel Plan Monitoring fees are in addition to any monitoring fees in relation to S106 agreements for the development. A schedule of fees is available at:

https://www.solihull.gov.uk/sites/default/files/migrated/Planning_S106-Monitoring-Fees-Advice-Note-Dec-2019.pdf

2.9.2. Travel Plan Monitoring Fees

In addition to S106 fees, SMBC will also require non-refundable TP monitoring fees which cover the administrative costs of monitoring your TP. Such tasks typically include:

- Evaluation of the initial plans and providing feedback;
- Commissioning of travel surveys, if not completed by the occupier/developer;
- Assessing monitoring reports;
- Discussion to agree any amendments to the travel plan; and
- Obtaining funding for a TP monitoring officer.

TP monitoring fees are covered under Section 93 of the Local Government Act 2003, which provides SMBC the power to charge for discretionary services they provide. These fees must be not-for-profit (on an annual basis), transparent and proportionate to the nature/complexity of the development. SMBC charges a standard monitoring fee of **£1,000 per annum** in order to meet its administrative costs.

The monitoring term for a TP will typically last a minimum of 5 years, which equates to a total monitoring fee of £5,000 per TP. Larger/more complex developments may, however, incur a higher fee and/or term of monitoring period to ensure SMBC meets all its incurred costs and the TP is successfully implemented. SMBC will require your TP to specify the length of the monitoring period as agreed.

The first annual monitoring fee will typically be payable upon the first anniversary of the first occupation.

2.9.3. What is a Travel Plan Deposit and why is it required?

In addition to monitoring fees, SMBC requests a TP deposit which is payable as a performance bond prior to commencement of the development. This is used as an insurance measure to protect SMBC against financial loss if they must undertake works relating to TP obligations that are not fulfilled. The bond (or any unused part of it) will be returned to the developer at the end of the agreed monitoring period if the TP requirements are met.

2.9.4. Does SMBC offer services to assist with implementation of my TP?

For residential development, SMBC can take responsibility for the implementation of the TP if the developer wishes. In this instance, in addition to a non-refundable monitoring fee, SMBC will require a non-refundable TP contribution that replaces of the TP deposit at a 20% premium.

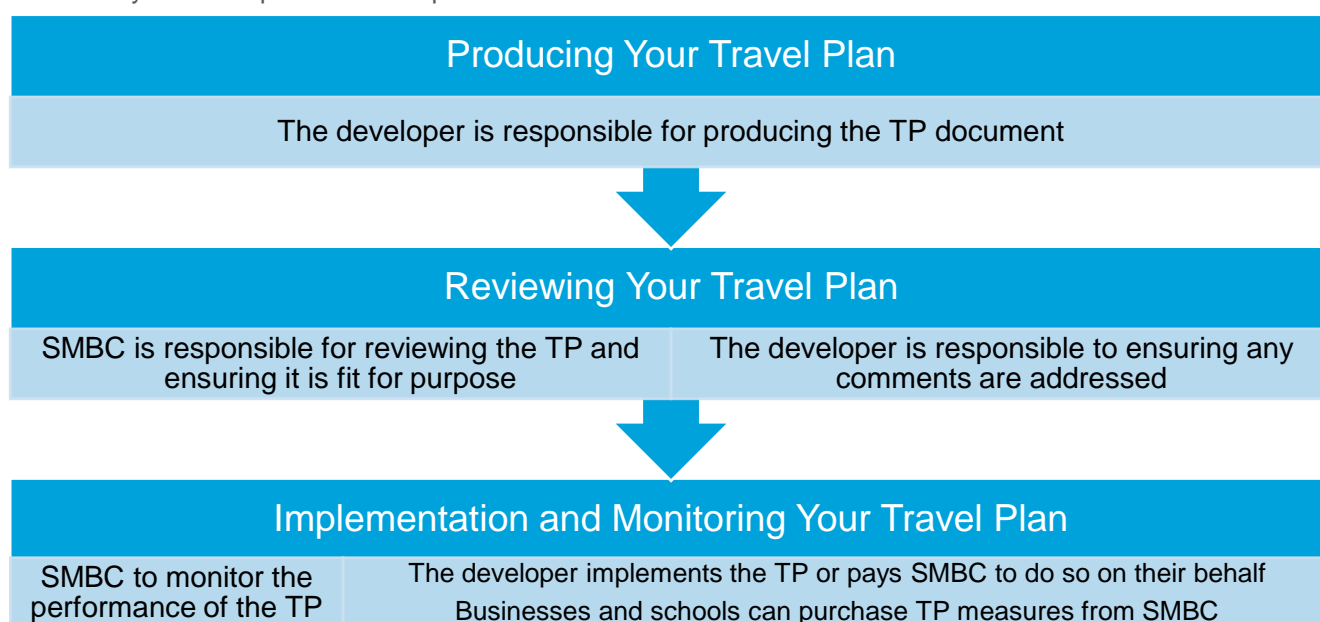
This contribution is necessary for covering the cost of a planning officer’s time, travel plan measures and for SMBC to absorb the risk of implementing the TP. More details are provided in the residential development guidance document.

For businesses and schools, TP measures can be purchased from SMBC to assist with the implementation of your TP. This will be sought as a TP contribution, which is commensurate to the value of measures agreed with the Sustainable Travel Team. More details are provided in the business and schools guidance documents.

2.10. What are the responsibilities of developing and monitoring the Travel Plan?

Under the fee schedule outlined in Section 2.9, it is the developer’s responsibility for producing, amending and implementing the TP and SMBC’s responsibility to advise, review and monitor the TP. However, SMBC can offer additional services to assist with the implementation of the TP depending on the type of development. In the case of residential developments, SMBC can take on full responsibility for TP delivery in exchange for a non-refundable TP contribution.

A summary of TP responsibilities is provided below:



2.11. How is a Travel Plan assessed?

It is important that TPs follow best practice and they will be assessed against this.

Particular attention will be paid to TP targets and whether they are SMART: that is Specific, Measurable, Achievable, Realistic and Time Bound:



The nature of the targets will be dependent on the type, size and location of the development, however SMBC would expect as a minimum mode shift targets from Single Occupancy Vehicles (SOVs) to more sustainable modes of transport. TPs are typically expected to achieve a 10% mode shift from SOVs over a 5-year period; however, this value can be flexible depending on the location and type of development. For example, a development in more accessible areas may be expected to achieve a higher percentage mode shift. If

developers can demonstrate measures that have put in place to achieve their mode shift target, this will also be taken into consideration – even if mode shift targets are not met and this can be reasonably explained.

In addition to the targets, SMBC will also assess your TP on the fulfilment of the Action Plan. As well as targets, your TP requires a focus on specific issues that need to be overcome or prevented from occurring as a result of a new development. This will be done in conjunction with assessing the accompanying TA for any new development proposal to ensure they work in totality. At no stage will a TP be regarded as a means of making a development acceptable, if it is unacceptable in respect of any other relevant policies.

Your TP document will be assessed in totality against the content requirements laid out in Section 3. Please consult this section, the guidance documents and the appendices for further information.

Travel Plan checklists have been provided in Appendix C to help your travel plan meet the standards

2.12. How is Travel Plan implementation managed?

Your TP is implemented by a TP coordinator, who will have responsibility for overseeing the application of your TP document. A nominated TP coordinator is a requirement of the TP 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 TP. SMBC must be notified as soon as possible if the post is to change.

If your TP is being implemented by SMBC on your behalf, a suitable planning officer will be nominated as the TP coordinator.

2.13. What is Modeshift STARS and how can it help me develop and monitor a Travel Plan?

Modeshift STARS is a national travel planning scheme that supports organisations with producing and delivering TPs. It is commonly used by schools but also can support business TPs. Modeshift STARS is accessed through an online portal and performs a number of functions:

- Support for putting together a TP document and delivering it;
- Provides a simple and easy way to monitor and evaluate the TP; and
- Rewards efforts in promoting and enabling sustainable travel through accreditation and a national schools award scheme.

Modeshift STARS runs a national award scheme and recognises schools who demonstrate excellence in walking, cycling and other forms of sustainable travel. National STARS accreditation is awarded to organisations that go above and beyond in developing, implementing and monitoring an effective TP to bring about a change in travel behaviour, reduce the number of single occupancy vehicle journeys to and from their site, and to improve the health and well-being.

The benefits of STARS include:

- Saves time and money in terms of producing the document;
- Supports the planning process by providing direct communication channels with Local Authority planning officers; and
- Helps meet BREEAM standards – an international sustainability assessment method.

More information can be found at the Modeshift STARS website: <https://www.modeshiftstars.org/>

3. Travel Plan content

3.1. Required content of a Travel Plan

Table 3-1 identifies the essential content required for a policy compliant TP:

Table 3-1 - Content for Policy Compliant Travel Plan

Travel Plan Section	Content
Introduction	<ul style="list-style-type: none"> • Development site name and details • Planning reference number and development description • Identification of the type of TP (full/framework/statement) • Contact details for the person responsible for managing the TP (the Travel Plan Coordinator) • The date and version of the TP
Context	<ul style="list-style-type: none"> • Summary of overview of the structure of the TP • Brief description of the nature and context of the proposed development • The scope of the TP (e.g. covering residents, employees, visitors, pupils/ students) • Key parameters for each element of the development i.e. number of units, land use etc. • Details of associated travel including number of users expected on site, employee shift patterns, opening times, postcodes of existing staff/visitors • Outline timescales for occupation and details of any phasing of the development
Site Assessment	<ul style="list-style-type: none"> • Plan of the development showing boundaries, existing and proposed access points, and main routes for all transport modes • Summary of the main transport related issues identified in the transport assessment and the infrastructure which will be delivered within the site and the surrounding area as part of the development • Quality and availability of transport infrastructure around the site, summarising how amenable local roads and other key routes (such as canal towpaths) are to walking, cycling, motorcycling and public transport • Descriptions of any existing facilities and car-related initiatives already in place (e.g. car clubs in the local area, car sharing schemes, pool cars)
Travel Surveys	<ul style="list-style-type: none"> • Details of any travel surveys undertaken • Set out initial travel data for the site based on the travel survey data, or where there is no or insufficient existing data, on the trip rates and modal splits agreed in the TA (with data drawn from comparable sites in TRICS or census data) • Details of when baseline surveys will be undertaken, usually within six months of first occupation or at 75% occupancy
Objectives	<ul style="list-style-type: none"> • Describe the key goals that the travel plan aims to achieve and how they link to local planning policies
Targets	<ul style="list-style-type: none"> • Objectives of the TP which are ambitious and SMART (Specific, Measurable, Achievable, Realistic & Time Bound)
Package of Measures	<ul style="list-style-type: none"> • Details of the package of measures to be implemented to achieve the targets and objectives of the TP. • Inclusion of all infrastructure and promotional/informational measures. • Understanding of how car parking will be managed • Details of marketing activities to encourage sustainable travel

	<ul style="list-style-type: none"> • Estimates of the cost of the key measures over the lifetime of the plan.
Management	<ul style="list-style-type: none"> • TP Coordinator details and responsibilities outlined
Monitoring	<ul style="list-style-type: none"> • Details of a monitoring programme detailing how monitoring surveys will be undertaken, and results communicated to SMBC. This could include: <ul style="list-style-type: none"> - A statistical summary of the modal split of employees/residents/users disclosed by the monitoring surveys; - The progress of the TP in achieving targets and identifying any amendments/remedial measurements to be agreed in writing by the council in the event that targets are not achieved; and - A plan for future actions to be implemented. • Additional information provided in Section 4 below
Action Plan	<ul style="list-style-type: none"> • A key part of the document and should provide a programme for delivering the measures and a means of communication this to the ultimate site users • Should be concise and focussed on the delivery of the measures, with short/medium/long term actions, timescales, and responsibilities of all involved, including the appointed TP Coordinator • All measures should be introduced in the action plan, specifying the person responsible for each action and sources of funding (where relevant)

3.2. Framework Travel Plans

Available information must be provided in order to form 'interim' targets and measures, such as TRICS or census data. This should be in place until such time as the detail is known, or approximately one month after the baseline survey is completed following occupation, whichever is sooner and in agreement with SMBC. Commitments towards provisional objectives and measures should be included, as well as a timeframe for completion.

3.3. Travel Surveys

A travel survey must be undertaken to establish current travel patterns and behaviours of staff, users and occupants of the site. This can then be used as a baseline for monitoring your TP. Wherever possible, these must be undertaken in 'neutral months' (Mondays to Thursdays from March to November avoiding holiday periods). It is expected that the baseline travel survey is conducted within the first year of first occupation.

What is captured through the travel survey will depend on the size and nature of the development, but should include as a minimum:

- Employee/resident/user/ student/pupil questionnaires – including current and preferred mode of travel for different journey types and current barriers to sustainable travel; for businesses, also include home location of employees (GDPR compliant) and mode and frequency of commuting and other business-related travel;
- Vehicle and bicycle counts on site;
- Supply and usage of onsite vehicle and cycle parking;
- Car occupancy/sharing data; and
- For larger developments, inbound and outbound movements by all travel modes on a typical day.

A response rate of at least 75% is considered desirable by SMBC. A lower response rate will be accepted, provided the necessary steps have been taken by the developer/occupier to conduct the survey. Planning officers can provide support on developing and issuing travel surveys, such as providing templates. Alternatively, surveys can be carried out using Modeshift STARS.

3.4. Setting Travel Plan Targets and Objectives

Objectives and targets are important qualitative and quantitative measures of how a TP is performing and is useful to forming the Action Plans and monitoring the TP. It gives the document weight and direction and tangible goals for developers to work towards.

As outlined in Section 2.10, targets must be SMART and provide indicators against which progress towards achieving the objectives are measured. Targets should include parameters, indicators and associated timescales. Targets are likely to be quantitative, although could include achieving certain measures by a particular time.

Objectives should form overarching aims of the TP and relate back to the findings and mitigation measures outlined in the TA/TS. Example objectives include:

- To reduce the impact and frequency of single occupancy car travel;
- Reducing the need to travel to and from the development site;
- To increase the accessibility of the site by sustainable modes;
- Encourage good urban design principles that improve walking and cycling connectivity;
- To reduce the transport impacts of the development on the local community;
- To address specific transport problems identified at site; and
- To improve travel choice for employees/visitors/residents/pupils/students.

3.5. Travel plan measures to be considered

SMBC has identified range of measures which should be considered for inclusion in the TP, which are shown in Figure 3-1 overleaf. It is critical that a package of measures is carefully identified which is tailored to the specific needs of the development site and occupiers and therefore enables the objectives and targets of the TP to be met.

Example packages of measures include, but are not limited to:

- Reducing the need to travel
- Increasing the level of active travel and public transport use
- Reducing the level of single occupancy travel
- Reducing car parking demand
- Reducing travel demand on the network
- Increasing promotion of travel planning to occupants

To note, Transport for West Midlands (TfWM) provide measures to complement public transport and active travel use which can be included within Travel Plans.

Related infrastructure contributions, such as electric vehicle points and bus stops, will be sought separately to the TP.

Figure 3 -1 - Measures for consideration for inclusion in a Full or Framework Travel Plan



4. Monitoring of Travel Plans

The developer must undertake monitoring to ensure the site achieves your TP targets and objectives agreed within the planning permission.

A clear monitoring programme should be provided (see TP Content section above), detailing what and how frequently surveys will be undertaken (usually a baseline survey, and at years one, three and five), who will be responsible and how this information will be reported.

The developer is required each year to submit an Annual Monitoring Report to SMBC for approval. This report shall demonstrate to SMBC's reasonable satisfaction how the TP has been implemented during the previous 12-month period and include:

Measures introduced and actions taken to promote the TP;

- A statistical summary of the modal split of employees/residents/users/students/pupils disclosed by the monitoring surveys;
- The progress of the TP in achieving targets and identifying any amendments to be agreed in writing by the council in the event that targets are not achieved; and
- A plan for future actions to be implemented.

The standard cost associated with SMBC's assistance in evaluating the Annual Monitoring Report is £1,000 per annum (although this can vary according to the nature/size of the development).

In certain cases, such as residential developments over 1,000 units or large mixed-use retail and employment sites, developments may incur extra Travel Plan Monitoring Fee costs.

4.1. Failure to deliver agreed travel plan targets and measures

Enforcement action or instigating default mechanisms can be used to deliver specific measures or outcomes but should be seen as a last resort in the event of a failure to achieve TP targets.

The planning obligation will set out the default mechanisms and remedial actions that will be activated in the event of failure to deliver agreed measures and outcomes, and a subsequent failure to agree an amendment to your TP.

In the event that the Annual Monitoring Report shows that your TP has failed to meet its objectives/targets, then the following will be required from the applicant:

- Remedial measures (in consultation with SMBC) to be implemented by the applicant to achieve the agreed TP targets;
- Further mitigation secured through a SMBC TP deposit in the form of a performance bond; and
- Formal enforcement action in consultation with the relevant planning officer, if secured by planning condition.

5. Contact Details

Email: travelplanning@solihull.gov.uk

Address: Council House, Manor Square, Solihull B91 3QB

Appendices



Appendix A. Policy Guidance Overview

Policy / Guidance	Key Objectives	Link to Document
National Planning Policy Framework (NPPF) (2012)	Decisions should take account of whether opportunities for sustainable transport modes have been taken up dependent on the nature and location of the site. Paragraph 111 states that all developments which generate significant amounts of movement should be required to provide a Travel Plan.	https://www.gov.uk/government/publications/national-planning-policy-framework--2
Solihull Local Plan Adopted (December 2013)	Policy P8 seeks thereafter to ensure that the travel demands associated with new development are managed in a sustainable manner and that subsequent traffic generated does not create or exacerbate network congestion or safety issues.	https://www.solihull.gov.uk/sites/default/files/migrated/Planning_LD_F_Local_Plan_Final.pdf
Vehicle Parking Standards and Travel Plans (2006) SPD	Travel plans should accompany planning applications for developments that are likely to have significant transport implications However, there may be other circumstances where a Travel Plan is required as follows: <ul style="list-style-type: none"> • Smaller developments comprising jobs, shopping, leisure and services that would generate significant amounts of travel in on or near to air quality management areas and in other locations where there are local initiatives or targets set out in the development plan or local transport plan for the reduction of road traffic or the promotion of public transport, walking and cycling. • School facilities which should be accompanied by a school travel plan that promotes safe cycling and walking routes, restricts parking and car access at and around schools, and includes onsite changing and cycle storage facilities. • Where a travel plan would help address a particular local traffic problem associated with a planning application that might otherwise be refused on local traffic grounds (a travel plan will not however, enable unacceptable development). 	Supplementary Planning Document Vehicle Parking Standards and Green Travel Plans (solihull.gov.uk)

<p>Solihull Local Plan Draft (October 2020)</p>	<p>Policy P8 seeks thereafter to ensure that the travel demands associated with new development are managed in a sustainable manner and that subsequent traffic generated does not create or exacerbate network congestion to a point of severe highway impact.</p> <p>Travel Plans will be required in association with particular types and scale of development to forecast the transport impacts associated with development, ensure that detrimental impacts are adequately mitigated and secure the implementation of, or contributions towards, appropriate measures to encourage and enable travel by non-car modes.</p>	<p>Draft Submission Plan Oct 2020 (solihull.gov.uk)</p>
<p>Hampton- in-Arden Neighbourhood Plan (August 2017)</p>	<p>This Plan forms part of the statutory Development Plan for the Borough and will be used by the Local Planning Authority to help determine planning applications in the Hampton-in-Arden Neighbourhood Area. The Plan includes key actions such as Road Safety and Parking (TRA1), Traffic Management (TRA2), Parking for Commuters (TRA3), Footpaths (TRA4), Buses (TRA5), Station Access (TRA6), Local Trains (TRA7), Birmingham Airport (TRA8), High Speed Rail (TRA9), Safe Cycle and Pedestrian Routes (TRA10), Local and Voluntary Transport Services (TRA11) and Road Safety (TRA12).</p>	<p>Hampton-in-Arden neighbourhood plan solihull.gov.uk</p>
<p>The Knowle, Dorridge and Bentley Heath Neighbourhood Plan (April 2019)</p>	<p>This Plan forms part of the statutory Development Plan for the Borough and will be used by the Local Planning Authority to help determine planning applications in the Knowle, Dorridge and Bentley Heath Neighbourhood Area. The Plan sets out a requirement for Travel Plans for all planning applications that include proposals which may generate significant traffic volumes, or are likely to have a material impact on the highway network or on parking demand in the village centres. The Plan also includes Policy T1 'Parking at Village Centres and for Rail Users', Policy T2 'Contributions to Additional Parking and Road Improvements', Policy T3 'Walking Infrastructure', Policy T4 'Cycling Infrastructure' and Policy T5 'Road Infrastructure'.</p>	<p>Knowle, Dorridge and Bentley Heath Neighbourhood Plan solihull.gov.uk</p>
<p>The Berkswell Parish Neighbourhood Plan (September 2019)</p>	<p>The Berkswell Parish Neighbourhood Plan forms part of the statutory Development Plan for the Borough and will be used by the Local Planning Authority to help determine planning applications in the Berkswell Neighbourhood Area. The Plan includes Policy B7 'Improving Car Parking Facilities at Berkswell Station', Policy B8 'Car Parking and Cycle Storage' and Policy B9 'Improving Accessibility for All'.</p>	<p>Berkswell Neighbourhood Plan solihull.gov.uk</p>
<p>Balsall Parish Neighbourhood Development Plan (June 2021)</p>	<p>The Balsall Parish Neighbourhood Development Plan forms part of the statutory Development Plan for the Borough and will be used by the Local Planning Authority to help determine planning applications in the Balsall Neighbourhood Area. The Plan includes Policy BE.5 'Highway Safety', Policy BE.6 'Parking Provision', Policy COM.3 'Encouraging Walking and Cycling' and Policy NE.5 'Minimising Pollution'.</p>	<p>The Balsall Parish Neighbourhood Development Plan (solihull.gov.uk)</p>

<p>Meriden Parish Neighbourhood Development Plan (June 2021)</p>	<p>This Plan forms part of the statutory Development Plan for the Borough and will be used by the Local Planning Authority to help determine planning applications in the Meriden Neighbourhood Area. The Plan includes projects and policies relating to Traffic, Transport and Road Safety including Project 1 'Road Safety Parking in the Village Centre', Policy T1 'Managing the Impact of Traffic', Project 2 'Removing 'clutter' and improving the visual Environment', Project 3 'Traffic Management' and Project 4 'Public Transport'.</p>	<p>Meriden NDP FINAL (solihull.gov.uk)</p>
<p>Solihull Connected</p>	<p>The Local Transport strategy is now accompanied by a detailed Delivery Plan which sets out our key investment priority areas including: enabling the HS2 Growth Strategy and Local Plan Review, connecting UKC growth centres, supporting access to business parks and housing sites, promoting a transformation in public transport, cycling improvements, increasing road network reliability and resilience and creating innovative local community transport initiatives.</p> <p>The Regulation 123 List currently includes infrastructure and travel planning measures that ease access by all modes to Solihull Town Centre. Section 106 planning obligations and Section 278 highway agreements can still be negotiated and delivered on development sites, where the planning proposal has a direct impact that requires mitigation or compensation.</p> <p>The Sustainable Transport Strategy aims to create a step change in walking and cycling levels and it will outline active travel mode share targets and how they will be achieved</p>	<p>Strategies - Solihull Connected solihull.gov.uk</p>
<p>Solihull Clean Air Strategy</p>	<p>Solihull's proposed package of measures to bring forward compliance and improve air quality on the two affected sections of the A45 has been accepted by DEFRA. The proposal includes enhanced workplace travel plans, use of cycling and walking networks, car sharing schemes and fleet efficiency advice.</p> <p>A Business Support Team is currently being established within the local authority who will work closely with businesses in the borough offering a package of support and guidance to encourage businesses to promote sustainable travel, agile working and to reduce their carbon footprint through effective travel planning.</p> <p>Support businesses in the borough to develop travel plans which include car sharing schemes and modal shift initiatives – including agile working practices.</p>	<p>Solihull Clean Air Strategy 2019 - 2024</p>
<p>Solihull Council Plan 2020-2025</p>	<p>Under Solihull's Inclusive Growth strategy, the council plan seeks to have more people walking, cycling and using public transport and for air quality to improve by 2025. This is combined with longer term targets of achieving Net Zero emissions in the Borough by 2041. Travel planning can support these aims. The Plan also aims to accelerate activities in the Climate Change Prospectus which build on the previously benefits achieved through changes in travel behaviour, particularly during the Covid-19 pandemic.</p>	<p>https://www.solihull.gov.uk/sites/default/files/migrated/Ourvisionandpriorities_Councilplan.pdf</p>

Solihull's Climate Change Prospectus 2020/21	Modal share targets are to be used as indicators for measuring progress against the aims of the Climate Change prospectus. The Prospectus encourages modal shifts as part of the delivery of the UKC Infrastructure Package.	Climate Change Prospectus 20-21 (solihull.gov.uk)
Town Centre Masterplan	The Masterplan seeks to reduce the dominance of cars as means of access to Solihull Town Centre. Currently, 77% people drive, whilst 42% of commuting trips are under 5km. It seeks to maximise opportunities for sustainable transport links to/from the Town Centre, to encourage greater modal shift.	Solihull Town Centre Masterplan solihull.gov.uk
Solihull Walking/Cycling Strategy	<p>Increase the number of people cycling and walking in Solihull; contributing towards the national target of 50% of short distance journeys undertaken by cycling and walking within the town centre</p> <p>Improve cycling capability throughout the borough by providing cycle training and initiatives; including Bikeability for children across the borough;</p> <p>Make cycling and walking 'the norm' through a major campaign and targeted promotion, particularly working with local schools, to educate and raise awareness of the benefits and opportunities for walking and cycling locally; and</p> <p>New developments to include high quality cycle and walking infrastructure and facilities.</p> <p>Development Policy 3 – High quality cycle parking and associated facilities, such as changing, shower and storage, should be considered as part of new development proposals (particularly employment sites)</p> <p>Development Policy 4 – The Council will require Transport Assessments and/or Travel Plans to accompany planning applications that include proposals which may generate significant traffic volumes, situated in traffic-sensitive locations or otherwise likely to have a significant impact on the highway network</p> <p>Development Policy 5 – We will seek developer contributions to develop the strategic cycle corridors and walking improvements outlined within the Solihull LCWIP</p>	Cycling and Walking Strategy solihull.gov.uk
Transport for West Midlands (TfWM)	Transport for West Midlands (TfWM) are responsible for transport strategy in the West Midlands. This includes freight, public and private transport. The long-term plan is called 'Movement for Growth' and explains how TfWM will improve transport in the West Midlands. TfWM have produced other policy and guidance documents which are also relevant to this SPD.	https://www.tfwm.org.uk/who-we-are/our-strategy/

Appendix B. Planning Obligations and Conditions for Travel Plans

B.1. Are planning obligations or conditions more suitable for the development in question?

Planning obligations provide the only mechanism to secure financial contributions for the implementation and/or monitoring of a TP. They support a long term strategy such as TP, as they are enforceable against the original covenantor or anyone subsequent party acquiring the land, and allow for greater level of detail to be agreed, such as specific outcomes, targets and remedial measures for a TP. They also support commitments involving third parties, such as Network Rail.

Tps should be secured through S106s as a rule of thumb. However, there are cases where S106s are not appropriate. It is recommended that if a development requires an S106 agreement for any matter, then TP requirements should be included.

Planning conditions on the other hand have the advantage of being simple and straightforward to impose, by setting out the requirements for a TP at the time of issuing planning permission. However, they can be rigid, limited in scope and cannot, for example, be used to secure payment to fund the measures stated in your TP. They can also be overturned on appeal. They are likely to be most appropriate when a limited number of sustainable transport measures are required to make the development acceptable, or it is not feasible to secure an S106. Conditions should state that a TP is submitted and/or a TP Coordinator is appointed prior to the occupation of the site, in the absence of any S106 that secures financial contributions from the developer.

In limited circumstances, where legal tests are met, a negatively worded condition can prohibit development authorised by the planning permission until a specified action has been taken (such as entering into a planning obligation).

Measures in relation to the TP, such as offsite infrastructure, access and public transport improvements should be treated separately within the S106 agreement. Cycle parking will be requested as a condition of planning approval.

B.2. What should be included in S106 agreements in relation to the Travel Plan?²

- A timetable for the preparation, implementation, monitoring and review of all stages of your TP;
- The appointment and funding of a TP Coordinator to be responsible for the management and maintenance of the travel plan, including the relationship with the local planning authority and/or other key stakeholders;
- The overall outcomes to be achieved by your TP; the performance indicators and targets;
- Details of the travel planning requirements for occupiers and future occupiers; the process for the monitoring and review of targets and measures;
- The measures to be implemented, such as the provision of transport infrastructure or services, or contributions with respect to their provision, parking controls and management and contributions towards other measures such as car and cycle clubs;
- A monitoring and review programme, detailing the survey methods to be used and who is responsible for funding the surveys, undertaking and reporting results;
- Any sanctions where the targets and indicators are not being met, and how and when they should be applied (e.g. a clause which sets what would happen in the event that the car mode share or total number of cars used - identified through monitoring - exceeds the target figure); and
- Any procedure for the variation by means of amendment, substitution or addition of targets or measures

Example clauses for S106 agreements are provided below.

² TfL (nd) How we secure and enforce travel plan targets. Available at: <https://content.tfl.gov.uk/how-we-secure-and-enforce-travel-plan-targets.pdf>

B.3. Example S106 Travel Plan Clauses³

Travel plan submission and site occupation

Not to occupy [the Development/any Dwelling] or cause or permit First Occupation until the Travel Plan has been submitted to and approved in writing by the Council.

No part of the Development shall be occupied unless any measures scheduled by the Travel Plan to be implemented before such occupation have been implemented.

Travel plan minimum requirements

The Travel Plan shall provide as a minimum:

- A timetable for the implementation of measures, identifying timescales and responsibilities for ensuring implementation.
- A schedule of Travel Plan monitoring, which includes both surveys and Monitoring Reports to be submitted to the Council. The Length of the Monitoring Period shall not be less than [5 years] from the date of Occupation of the Development.
- An initial Baseline survey to be undertaken within 6 months of initial Occupation of the Development, or when [75% of units are occupied/ 75% of staff are on site etc.].
- The methods of carrying out the surveys for the purposes of Monitoring to include details of the equipment to be used, the methods of collecting the data and the methods for calculating the Modal Shift.
- A budget for the implementation of measures and carrying out of surveys, and a commitment to spend this budget.

The Travel Plan shall include the following types of targets, to be approved by the Council prior to First Occupation:

- Implementation of actions on-time and to an agreed quality
- Modal split
- The Development should not generate more trips by Car to the Site than off-street parking spaces available
- Absolute numbers of vehicles on-site at any one time / arriving on site between [time] and [time]

The Travel Plan shall set targets for and monitor occupiers and users of the Development such as:

- Residents
- Staff commuters
- Staff business travel
- Students
- Visitors / customers / guests / patients
- Deliveries

Travel plan coordinator

The Development shall not be [First Occupied / further Occupied] unless and until

- i. the Travel Plan Coordinator has been appointed and commenced their responsibilities, and the details notified to the Council as aforesaid; and
- ii. any measures scheduled by the Travel Plan to be implemented before such occupation has been implemented.

Prior to [First Occupation/Occupation of the Development] the Owner shall appoint a Travel Plan Coordinator and notify the Council in writing of the name, address, telephone number and e-mail address of the person appointed.

³ Example clauses from WestTran's RObUST tool and Suffolk County Council (2019) Travel Plan Guidance Document

Travel plan implementation

To fully implement the Travel Plan approved by the Council in accordance with the timescales contained in the Travel Plan (or as amended by the agreement between the Council and the Owner in writing).

The Owner shall use all reasonable endeavours to ensure that the Travel Plan (or Final Travel Plan) is complied with and that each of the targets contained in the Travel Plan are met.

The Owner shall continue to implement and observe the requirements and obligations set out in the Travel Plan (or such amended plan as may be agreed between the Owner and Council) for a period of not less than [five] years following First Occupation/ Occupation of the Development (or if later, for a period commencing on the date of first Occupation and ending on the date being ten years from the date that 50% of the Development is Occupied).

Travel plan monitoring

A Baseline Survey shall be undertaken within 6 months of First Occupation / Occupation of the Development [in neutral months, Monday to Thursdays from March to November avoiding holiday periods]. Further Monitoring Surveys shall thereafter be undertaken during the same calendar month as the Baseline Survey, for a period of not less than [five] years in the [3rd and 5th] years from First Occupation/Occupation of the Development.

Within [one] month of carrying out the Monitoring Surveys, the Owner shall submit a Monitoring Report to the Council.

The Owner undertakes that it will each year submit an Annual Monitoring Report to the Council which shall:

- a. Demonstrate how the Travel Plan has been implemented during the previous 12 month period to include:
 - i. Measures introduced and actions taken to promote the Travel Plan.
 - ii. A statistical summary of the Modal Split of Employees/ Residents/ Users disclosed by the Monitoring Surveys.
 - iii. The progress of the Travel Plan in achieving targets; and
- b. in the event that targets as set out in the Travel Plan are not achieved identifying any proposed amendments to the Travel Plan together with a plan for future actions to be implemented.

And any measures identified in part (b) shall be submitted to the Council for agreement.

Satisfaction of obligations

When satisfied that one or more of the obligations in this deed have been performed and at the written request of the Owner the Council shall provide written confirmation that the relevant obligations contained in this Deed have been fulfilled.

Transport contributions

Payment of the Transport Improvements Contribution required under this Deed shall be made to the Council on the following basis:

- a. Upon receipt of the Transport Improvements Contribution the Council shall deposit the funds in an interest bearing account of its own choosing and all interest (less tax if payable and reasonable administrative costs and/or fees) shall be credited to the account; and
- b. The principal and interest shall be applied by the Council towards the purposes specified in this Deed for which they are to be paid or for such other purposes associated with the Development as the Owner and the Council shall agree in writing.
- c. Following satisfaction by the Owner of their obligations under this Deed and upon written request by the Owner to the Council, the Council will pay to the Owners such amount of any payment made in respect of the Transport Improvements Contribution by the Owners to the Council under this deed which has not been spent or committed in accordance with the provisions of this Deed within 7 years of the date of receipt by the Council of such payment together with any accrued interest on the uncommitted account.
- d. Upon reasonable request by the Owner the Council shall (subject to the payment of its reasonable costs provide to the Owners such evidence as the Owners shall reasonably require in order to confirm the expenditure of the Transport Improvements Contribution.

Payment of monitoring costs

The Owner covenants with the Council to pay on or prior to completion of this Deed the Monitoring Costs in the sum of [£1,000], and to send the Monitoring Costs to the [title of Council staff member who deals with Travel Plan monitoring] in accordance with the terms of Clause [A], prior to prior to the first Occupation of the [100th] dwelling.

Clause [A]: Any notice certificate or other communication given under this Deed to the [title of Council staff member who deals with Travel Plan monitoring] shall quote the planning reference number [X] and shall be addressed to the [title of Council staff member who deals with Travel Plan monitoring], [Solihull Metropolitan Borough Council], [address].

The Owner covenants to pay further instalments of the Travel Plan Evaluation and Support Contribution of [£1,000] BCIS Indexed annually prior to the anniversary of the date of first Occupation of the [100th] Dwelling SAVE THAT no further instalments of [£1,000] BCIS Indexed of the Travel Plan Evaluation and Support Contribution shall be payable by the Owner after [five years] from the first Occupation of the [100th] dwelling or after one year after Occupation of the final Dwelling, whichever is the latter.

Bonds

Unless the Council shall otherwise agree in writing, prior to the Commencement of the Development, the Owner shall deposit a Bond with the Council in the sum of [£X], [which for the avoidance of doubt shall / shall not be Index-Linked], for a period of not less than [X] years with the Council to guarantee:

- a. The implementation of all measures specified in the Travel Plan;
- b. The completion of surveys/questionnaires as specified in the Travel Plan;
- c. The submission of monitoring reports to the Council as specified in the Travel Plan;
- d. The achievement of targets identified in the Travel Plan or defined by the Council thereafter.

The Council covenants with the Owner as follows:

1. Upon receipt of the Bond, the Council shall deposit the sum as a separate and identifiable sum in an interest bearing account of its own choosing and all interest shall be credited to the account and the Bond shall be held on account for the Owner; and
2. The Council agrees that the Bond, together with any interest accrued, shall be released and returned to the Owner upon the expiry of [X] years following First Occupation, except in the event of a default by the Owner to secure [a, b, c and/or d of the above clause] within the timetable specified in the Travel Plan. In the event of such a default, the Council shall be entitled to retain an amount of the Bond based on an agreed formula.

Workplace Travel Plan

The Owner covenants to submit the Interim Workplace Travel Plan to the Council for written approval by the Council prior to the Commencement of Development;

The Owner hereby covenants not to Commence Development or permit or allow the Commencement of Development unless and until the Interim Workplace Travel Plan has been submitted to, and approved in writing, by the Council;

The Owner covenants to implement the Interim Workplace Travel Plan as approved by the Council in full

The Owner covenants to submit the Full Workplace Travel Plan to the Council for written approval by the County Council no more than six (6) months after the first Occupation of the first Commercial Unit.

The Owner hereby covenants not to Occupy or permit or allow Occupation of any more Commercial Units than Occupied as at the date six (6) months after the first Occupation of the first Commercial Unit until the Full Workplace Travel Plan has been submitted to, and approved in writing by, the Council

B.4. Planning Conditions⁴

The submitted Travel Plan [Statement] shall be in operation on occupation of the development and thereafter for a period of [five] years. The appointed Travel Plan Coordinator shall provide monitoring reports to the Local Planning Authority after [1, 3 and 5] years to be audited by the Council.

⁴ East Sussex (2020) Travel Plans for Development

Reason: In order that the development site/use hereby permitted maximises its accessibility by non-car modes and to meet the objectives of sustainable development, in accordance with Policy 8 of the Solihull Local Plan [insert year]

No part of the development shall be occupied until a Travel Plan [Statement] has been submitted to and approved in writing by the Local Planning Authority in consultation with the Highway Authority. The Travel Plan once approved shall thereafter be implemented as specified within the approved document and in accordance with the latest guidance and good practice documentation as published by the Department for Transport and/or as advised by the Council. The appointed Travel Plan Coordinator shall provide monitoring reports to the Local Planning Authority after [1, 3 and 5] years to be audited by the Council

Reason: To encourage and promote sustainable transport, in accordance with Policy 8 of the Solihull Local Plan [insert year].

Appendix C. Checklist for Applications

Indicative checklist for applications which applicants should use to ensure that their assessment is robust and meets the standards required by SMBC.

C.1. Schools

Topics	Items required
Introduction	<ol style="list-style-type: none"> 1. School details 2. Pupil and staff information 3. Opening times 4. Working group members
Travel and Transport Infrastructure	<ol style="list-style-type: none"> 1. On site facilities (Incl. information around estimated number of people and vehicles accessing the site) 2. STARS routes to school audit
Surveys, Modal Shift and Targets	<ol style="list-style-type: none"> 1. Pupil Survey 2. Staff Survey 3. Targets
Action Plan	<ol style="list-style-type: none"> 1. Select a minimum of 5 initiatives, one must be a consultation initiative, one must be annual monitoring
Travel and Transport Issues	<ol style="list-style-type: none"> 1. List specific issues and how these are identified
Sign Off	<ol style="list-style-type: none"> 1. School Travel Plan Champion 2. Head Teacher 3. Governor 4. LA Officer

C.2. Residential (Interim)

Topics	Items required
Introduction	<ol style="list-style-type: none"> 1. Overview of the proposed site 2. Developer/Landowner details
Background Information	<ol style="list-style-type: none"> 1. Key points from the TA (Travel Assessment) that are relevant to the Travel Plan
Travel and Transport Infrastructure	<ol style="list-style-type: none"> 1. On site facilities (Incl. information around estimated number of people and vehicles accessing the site)
Objectives	<ol style="list-style-type: none"> 1. To ensure the developments trip rates are agreed at the planning process
Targets	<ol style="list-style-type: none"> 1. Modal shift targets based on trip rate reduction 2. A commitment to identify suitable SMART targets once the site is occupied
Action Plan	<ol style="list-style-type: none"> 1. List of actions to meet targets, incl. trigger points for delivery 2. Interim marketing strategy
Welcome Pack	<ol style="list-style-type: none"> 1. Identify the content of the welcome pack
Monitoring	<ol style="list-style-type: none"> 1. Commitment to undertake the baseline monitoring on occupation of the 100th dwelling. To produce a full travel plan within 3 months of occupation of the 100th dwelling 2. A commitment of 2-week vehicular traffic counts, set up on all vehicular access points in the development (not in public or school holidays) 3. A commitment to provide the 14-day surveys 4. A commitment to provide uptake of PTP (personalised travel plans) 5. A commitment to provide the number of uptake of multi-modal vouchers
Budget	<ol style="list-style-type: none"> 1. Travel Plan budget

C.3. Residential (Full)

Topics	Items required
Introduction	<ol style="list-style-type: none"> 1. Overview of the proposed site 2. Build out rate/phasing 3. Current number of dwellings occupied 4. Developer and TPC (Travel Plan Coordinator) details
Background Information	<ol style="list-style-type: none"> 1. Agreed trip generation from TA (Incl. am and pm peaks)
Travel and Transport Infrastructure	<ol style="list-style-type: none"> 1. On site facilities (Incl. information around estimated number of people and vehicles accessing the site)
Objectives	<ol style="list-style-type: none"> 1. To ensure the developments trip rates are agreed at the planning process
Targets	<ol style="list-style-type: none"> 1. Modal shift targets based on trip rate reduction 2. Additional SMART targets once the site is occupied
Action Plan	<ol style="list-style-type: none"> 1. List of actions to meet targets, incl. trigger points for delivery 2. Include details on how this will be marketed to residents
Welcome Pack	<ol style="list-style-type: none"> 1. Summary of the content of the welcome pack. Full pack to be appended
Monitoring	<ol style="list-style-type: none"> 1. A commitment to monitor the travel plan annually on each anniversary of the occupation of the 100th or final dwelling if under 100 for a minimum of 5 years or one year after occupation of the final dwelling. (whichever is the longest duration) 2. 2-week vehicular counts, set up on all vehicular access points in the development (not in public or school holidays) 3. A commitment to provide the number of surveys 4. A commitment to provide uptake of PTP (personalised travel plans) 5. A commitment to provide the number of uptake of multi-modal vouchers
Budget	<ol style="list-style-type: none"> 1. Travel Plan budget

C.4. Workplace (Interim)

Topics	Items required
Introduction	<ol style="list-style-type: none"> 1. Organisation details 2. Opening times/working hours
Travel and Transport Infrastructure	<ol style="list-style-type: none"> 1. On site facilities 2. Site audit (Incl. information around estimated number of people and vehicles accessing the site)
Targets	<ol style="list-style-type: none"> 1. List specific transport issues and how these are identified
Action Plan	<ol style="list-style-type: none"> 1. Select a minimum of 5 initiatives and one must be a consultation initiative, one must be annual monitoring.

C.5. Workplace (Full)

Topics	Items required
Introduction	<ol style="list-style-type: none"> 1. Organisation details 2. Staff and visitor information 3. Opening times/working hours 4. Working group members
Travel and Transport Infrastructure	<ol style="list-style-type: none"> 1. On site facilities 2. Site audit (Incl. information around estimated number of people and vehicles accessing the site)
Targets	<ol style="list-style-type: none"> 1. Staff survey 2. Targets 3. List specific travel
Action Plan	<ol style="list-style-type: none"> 2. Select a minimum of 5 initiatives and one must be a consultation initiative, one must be annual monitoring.

Atkins Limited
The Axis
10 Holliday Street
Birmingham
B1 1TF

© Atkins Limited except where stated otherwise