

SMBC Travel Planning Guidance for Developers

Travel Plan Guidance for Commercial
Developments

SMBC

December 2022

Commercial Workplace Developments



Notice

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This document has 12 pages including the cover.

Document history

Document title: Travel Plan Guidance for Commercial Developments

Document reference: Commercial Developments

Revision	Purpose description	Originated	Checked	Reviewed	Authorised	Date
Rev 3.0	First Draft for Engagement	ML	RA	RE	RE	25/03/21
Rev 4.0	For Issue	ML	RA	RE	RE	20/08/21
Rev 5.0	Final Issue	ML	RA	RE	RE	31/08/21

Client signoff

Client	SMBC
Project	SMBC Travel Planning Guidance for Developers
Job number	
Client signature/date	

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What is a Business Travel Plan?

A Business Travel Plan (BTP) 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.

BTPs 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.

BTPs 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 BTPs 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 Business Travel Plans?

BTPs 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.

BTPs 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. BTPs 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 BTP 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 Business Travel Plan be submitted?

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

A BTP 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 BTP 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 Business Travel Plans

A BTP 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 Business Travel Plan include?

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

Suggested measures for a Business Travel Plan

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

Figure 1 - Suggested measures for inclusion in a Business Travel Plan



Responsibilities of implementing and monitoring the Business Travel Plan

Implementation

The BTP is implemented by a Travel Plan Coordinator, who will have responsibility for overseeing the application of the BTP document. A nominated Travel Plan Coordinator is a requirement of the BTP 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 BTP.

Financial securities that are sought from owners/developers

Any BTP requires funding in order to be effective. This can be used to facilitate the implementation of the BTP, 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 BTP, the responsibility lies with the developer/ site owner/ third party appointed by the developer to deliver the measures identified in the BTP 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 in instalments on successful delivery of measures and completion of agreed targets within the BTP.

Should the developer / owner fail to deliver the BTP 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 BTP.

Can SMBC assist with the implementation of my Business Travel Plan?

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

Measures can be purchased from SMBC to assist with the implementation of the BTP; this will be sought as a developer Travel Plan contribution and will be commensurate to the value of the measures agreed with the Sustainable Travel Team at pre application stage.

If this approach is taken, the bond / cash deposit from the developer will not be required, as the measures will be purchased directly from SMBC to implement.

Monitoring of Business Travel Plans

A commitment to the monitoring and review of the BTP 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 BTP required through the planning process must be reviewed and updated annually for the first five years following occupation and bi-annually thereafter.

It will be the responsibility of the owner and occupier to produce, amend, implement and monitor the BTP and the responsibility of SMBC to advise and review the document where appropriate.

Effective monitoring of BTPs 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 BTP'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 BTP and the specific measures implemented as part of the BTP for encouraging sustainable travel.

Following a survey of the site, or at a frequency agreed within the BTP, a monitoring 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.

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).

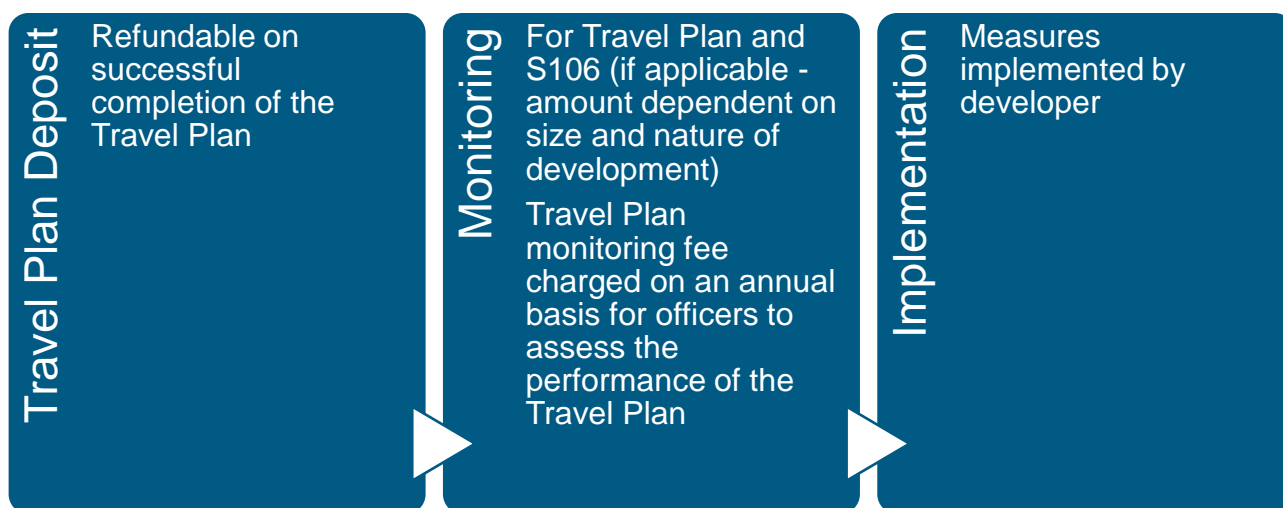
Schedule of Travel Plan fees

Monitoring fees will be dependent on the length of the monitoring period set¹ 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;
- Maintain beneficial measures such as car share initiatives; and
- Advise coordinators.

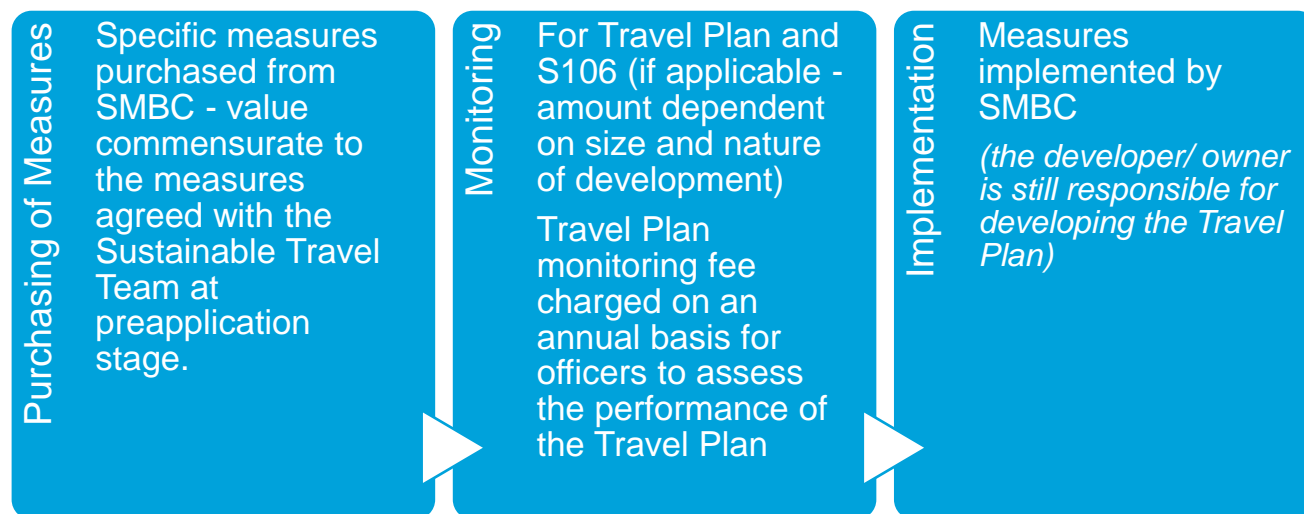
Monitoring fees will be charged in addition to the Travel Plan deposit/contribution sought by SMBC. Figures 2 and 3 outline the associated fee schedules for BTP delivery:

Figure 2 - Travel Plan Fee Schedule Option 1



¹ 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 Error! No text of specified style in document.



Business Travel Plan Measures

This guidance document aims to provide businesses with a notional cost for implementing some of the suggested measures within a BTP. Typical measures are shown in Table 1 below with an estimated one-off initial and subsequent annual cost per employee. These costs are expected to be proportionate to the size of the business but could also vary according to the location and the type of measures implemented.

Contributions sought for implementing a BTP will be in addition to any costs required to provide a Travel Plan Coordinator resource, alongside any contributions sought for improvements to walking, cycling and public transport facilities from developers, as these are all complementary parts of a sustainable transport package.

Table 1 provides some indicative costs of expenditure for business Travel Plan measures:

Table 1 – Indicative Expenditure for Travel Plan Measures²

MEASURE	INDICATIVE ANNUAL COST				AVERAGE INDICATIVE COST BREAKDOWN
	A	B	C	D	
Dr Bike event	1 session £150pa	2 sessions £300pa	3 sessions £450pa	4 sessions £600pa	£150 per session
Annual marketing campaign	£750 / 5 £150 pa	£1000 / 5 £200pa	£1500 / 5 £300pa	£1500 / 5 £300pa	£1,500
Produce pocket journey planning/maps	1 Map £750 / 5 £150pa	2 Maps £1500 / 5 £300pa	3 Maps £2250 / 5 £450pa	4 Maps £3000 / 5 £600pa	£750 bespoke map design and production
Cycle Training (1-2-1)	1 session £50pa	1 session £50pa	2 sessions £100pa	3 sessions £150pa	£50 per 1 to 2 hour session (1 instructor)
Cycle Training (Group)	1 session £90pa	1 session £90pa	2 sessions £180pa	3 sessions £270	£90 per 1 to 2 hour session (1 instructor) max 6 people
Public Transport taster tickets	5 days £37.50pa	12 days £90pa	50 days £375pa	100 days £750pa	Taster £40 per employee, 1 Day Scratch Card £7.50 each, Swift PAYG Minimum £10, Maximum £50 Swift Multi Day £22 for 5, £42 for 10 Swift season ticket 1 week £34 (calculations based on 1 day scratch card, subject to price increase with operators).
Annual Travel Planning event including: <ul style="list-style-type: none"> • Car share guidance • Journey planning • Surveys 	One 1 hour event, 1 FTE £50pa	One 2 hour event, 1 FTE £100pa	One 3 hour event, 2 FTE £300pa	One 3 hour event, 2 FTE £300pa	£50 per hour x 1 staff
TOTAL ANNUAL COST up to	£678	£1130	£2155	£2970	
TOTAL 5 YEAR COST up to	£3390	£5650	£10,775	£14,850	

A = Micro enterprises: 1 to 9 employees.

B = Small enterprises: 10 to 49 employees.

C = Medium sized enterprises: 50 to 249 employees.

D = Large enterprises: 250 employees or more

² Indicative costs for Travel Planning measures provided by SMBC's Sustainable Travel Team

Modeshift STARS Business

Businesses can use the online platform Modeshift STARS to set up and implement their BTPs.

Modeshift STARS Business is a national scheme to support organisations with producing and delivering effective Travel Plans and recognise excellence in this area of work by providing formal accreditation.

Modeshift STARS Business is accessed through an online portal that:

- Helps you to put together and deliver a Travel Plan for your organisation
- Provides a simple and easy way to monitor and evaluate this Travel Plan
- Recognises and rewards your efforts in promoting and enabling sustainable travel.

Why Modeshift STARS?

- **Saves time and money** – Modeshift STARS Business saves time when creating a Travel Plan therefore reducing the cost of writing the document.
- **Supports the planning process** – provides a direct communication channel with local authority Planning & Transport teams.
- **Delivers on Corporate Social Responsibility objectives** – Modeshift STARS Business can help your organisation support sustainable travel in the community.
- **Supports the development of a healthy and sustainable workforce** – Modeshift STARS Business is about creating a healthier and more productive workforce for your organisation.
- **Helps meet BREEAM standards** – via the production of a national standard Travel Plan.
- **Provides National Accreditation** – receive national recognition for your achievements and the chance to win National Awards.

As SMBC subscribes to Modeshift STARS Business, businesses in Solihull can now view and access a range of resources and guidance documents on implementing BTPs for free by visiting: modeshiftstars.org

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