

Report subject	Travel Plan Monitoring Fees
Meeting date	10 December 2024
Status	Public Report
Executive summary	Travel Plan Monitoring fees are inconsistently applied across BCP. This report sets out and seeks approval to harmonise travel plan monitoring fees across BCP.
Recommendations	<p>It is RECOMMENDED that Cabinet:</p> <ul style="list-style-type: none"> (a) approves the harmonisation of travel plan monitoring fees for new developments requiring planning permission across all of BCP, commencing with those registered complete from 1 April 2025 (b) approves the introduction of annual increases tied to RPI on 31 March annually, adjusted to the nearest £5 (c) approves that at the point of implementation of the harmonised Travel Plan Monitoring Fees, the existing Poole Travel Plans Supplementary Planning Guidance Document (2003) be withdrawn (d) approves the delegation to the Director of Planning & Transport the ability to undertake minor alterations to scheme band criteria in accordance with operational requirements and best practice (e) approves the delegation to the Director of Planning & Transport the ability to extend the monitoring time period in accordance with operational requirements and best practice.
Reason for recommendations	To allow the harmonisation of travel plan fees across BCP to occur, and to ensure the agreed fee level remains in line with inflation.

Portfolio Holder(s):	Councillor Andy Hadley – Portfolio Holder for Climate Response, Environment and Energy.
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Wards	Council-wide
Classification	For Recommendation/Decision

Background

1. A Travel Plan aims to reduce traffic and encourage green travel and is commonly used by businesses and workplaces. They can also be applied to residential and commercial developments to reduce the impact and the effects they would have on surrounding roads. A successful travel plan gives a workplace or development a range of travel options both to and from a site. They benefit the employer and their employees, but also the surrounding residents, communities and environment. Travel Plans are requested when a relevant planning application is submitted.
2. A review of working practices across the Transport Development Management (TDM) Team has identified that Travel Plan monitoring charges and the time periods for monitoring of travel plans vary reflecting historical practices. The Borough of Poole had a specific Supplementary Planning Guidance document which sought a monitoring fee while other legacy authorities took different approaches.
3. Travel Plan monitoring charges have and are currently continuing to be applied across the Poole area of BCP for relevant planning applications via a clause within a S106 agreement to enable the council to collect a fee to fund the following:
 - the initial setting up of a travel plan;
 - ongoing annual monitoring;
 - ensuring arrangements are made at the end of monitoring period to continue initiatives identified in the travel plan.
4. Travel Plan monitoring charges have not typically been applied to new developments within the Bournemouth and Christchurch areas. Inconsistency also exists with the monitoring periods for travel plans; Developments in Christchurch may have a monitoring period of 3 years, with developments in Bournemouth typically requiring 5 years of monitoring and similar developments in Poole with a monitoring period of up to 7 years. A harmonisation approach is recommended to address these discrepancies.
5. The costs of monitoring travel plans associated with new developments are being met through revenue budgets for applications in the Bournemouth and Christchurch area. In Poole the income generated from the monitoring fees associated with developments is used to offset the costs for monitoring Poole Travel Plans.

Options Appraisal

6. In this section options for cabinet to consider as part of the review of travel planning fees are presented below:

a. Zero charge everywhere

7. The removal of the charge from Poole, bringing practice in line with Bournemouth and Christchurch areas would be popular with local developers and agents, however this would not address the resourcing cost of monitoring travel plans and would increase the budget pressure.
8. Should monitoring fees be removed it is likely that Travel Plan monitoring will have to be stopped entirely undermining the delivery of the council's adopted motion aiming to get 50% of journeys within the BCP area to be done by walking, scooting, cycling or public transport by 2030, in the spirit of the government's 'Decarbonising Transport. A Better, Greener Britain 2021 report'. **This option is therefore not recommended.**

b. Mid-market rate based on other authorities pricing

9. A review of other local authority travel plan fees has been undertaken using a sample from across England using a standardised 5 year monitoring period as monitoring periods vary depending on location.

Authority	Size of development	5 years of annual monitoring fee
Hampshire	Modest	£5,000
Hampshire	Major	£15,000
Plymouth	Modest	£2,800
Plymouth	Major	£3,570
Bristol	Modest	£3,985
Bristol	Major	£5,693
Oxford	Modest	£1,890
Oxford	Major	£3,110
North Somerset	All	£4,600
Cumbria	All	£6,600
East Sussex	Modest	£4,500
East Sussex	Major	£6,000
Camden	Modest	£5,674
Camden	Major	£11,348
Average	Major	£7,454
	Modest	£3,975
	All	£5,698

10. The typical mid estimate cost equates to £5,698 for a 5-year monitoring period, with major and modest fees being available at £3,975 and £7,454 respectively.
11. This mid-market estimate approach could be seen as pricing the monitoring of travel plans within the range bearable by the market nationally but excludes local factors. The review demonstrates there is little consistency as to the level travel plan monitoring fees are set across the country.
12. The fixed fee element would not be reflective of the differences in resource required to monitor the development dependent upon its scale. This could create a significant

disparity between smaller sites and larger sites with the fee level not necessarily proportionate to the time required to monitor each site. **This option is therefore not recommended.**

c. Tiered approach

13. It is recommended that a tiered charging schedule reflecting monitoring bands over a 5-year monitoring period is implemented.
14. It should be noted that the monitoring period of 5 years was only supported by 16% of the respondents to the public consultation with 7 years being the preferred option (35%). A shorter time period is recommended due to the type of developments determined in BCP are weighted most frequently towards the small scale major developments, but the time period should be kept under review to assess its relevance.
15. The tiered charges reflect the additional set-up, monitoring, and succession work required from small-scale major (BCP1) developments right up to the largest developments (BCP4).

Band Thresholds	BCP1	BCP2	BCP3	BCP4
Fees (£)	4950	6800	7265	9700
Charge for set-up and 5 years monitoring:				

16. And the thresholds at which Travel Plans are required would be defined as follows:

Band Thresholds	BCP1	BCP2	BCP3	BCP4
Domestic units (nos of dwellings)	50	200	400	600+
Class C1 Hotel (nos of beds)	75	100	150	200
Class E Commercial, Business and Service	2000 m ²	4000 m ²	6000 m ²	8000 m ²
Class F1 Learning and non-residential institutions	1000 m ²	2000 m ²	3000 m ²	4000 m ²
Class F2 Local Community Uses	1000 m ²	2000 m ²	3000 m ²	4000 m ²
Class B2 General Industrial	400 m ²	800 m ²	1200 m ²	1600 m ²
Class B8 Distribution/Wholesaling	4000 m ²	8000 m ²	12000 m ²	16000 m ²
Stadia (nos of seats)	1500	3000	4500	6000
Other	Case by case basis			
Fees (£)	4950	6800	7265	9700
Charge for set-up and 7 years monitoring:				

17. The recommended tiered approach above is based on a modified version of the Poole scheme but with an uplift to 2024 prices. **This option is recommended.**

d. Proportionate charge to planning application fee

18. Planning application fees are related to the scale of development proposed so would allow for differentials in travel plan monitoring fees. They would not however be reflective of the time required to monitor travel plans as the scale of the impact of a development is related to the future number of occupants and the level of trips associated with the development. Factors not included in the application fee calculations. **This option was discarded and not consulted upon.**

Consultations undertaken:

19. A public consultation exercise was undertaken from 8 July to 19 August 2024 using the BCP Engagement HQ platform and was promoted through various channels. A full consultation report has been prepared along with two Snap Reports. The consultation was targeted at developers, planning agents and planning professionals primarily alongside the general public and business community.
20. There were over 1,181 visits to the consultation page with 920 aware visitors (i.e. a visitor who has made at least one single visit to the webpage) and 452 informed visitors i.e. a visitor who has taken the 'next step' from being aware and clicked on something.
21. After launching the consultation on the 8 July, it was apparent that there was an error in the figures presented for the three and six travel plan scenarios for 'Option 3 - Align with other councils'. The figures were incorrectly stated as £34,188 for six travel plans a year and £68,376 for 12 travel plans a year. The error was identified on the 11 July and the figures were corrected to £17,094 for three travel plans a year and £34,188 for six travel plans a year for the 'Option 3 - Align with other councils' option.
22. One of the enclosed Snap reports provides the responses before this change (labelled "Snap Report before option change on 11.7.2024 (162 responses)" which was published at 12:03pm on the 11 July 2024 and another provides the responses following the change (labelled "Snap Report after option change on 11.7.2024 (99 responses)" which was published at the end of the consultation.
23. In the comments that were received it was clear that several respondents had misunderstood the proposal about implementing a charge, assuming that BCP residents would be charged for harmonising the current Travel Plan Monitoring Scheme. It was stated in the supporting information for the consultation that it would be developers being charged for the travel plans, not residents. However, this did not prevent the misunderstanding from taking place and could have led to some of the 'no charge' responses, however, it is unclear what proportion of these responses were driven by this.
24. Two days after the launch of the consultation, the local press published an article about the consultation entitled "Fees could be introduced by BCP Council to reduce car usage". This misleading title in the press could have driven some of the 'no charge' responses received; however, it is unclear what proportion of the responses were driven by this article.
25. Additional social media misunderstandings regarding the consultation and the options presented were identified during the early stage of the consultation. These are likely to have influenced a proportion of the responses, but it is unclear as to the extent.
26. Post error correction just under half of respondents (49%) said they preferred to apply the existing Poole monitoring fees across BCP, with under a third (29%) said they preferred the 'no charge' option, and under a fifth of respondents (16%) said the monitoring fee should align with other councils. Under a tenth (6%) said they did not know / were not sure.
27. Over a third of respondents across the entire consultation period (35%) said they preferred the seven-year monitoring period with less than a fifth of respondents

(16%) said they preferred the three-year or five-year monitoring periods and a third (33%) said they did not know / were not sure.

28. Having analysed all of the consultation responses in detail, no alternative approaches to those consulted upon were suggested. Multiple responses highlighted that “any monitoring of travel plans comes at an administrative cost. That being the case there should be a cost imposed....” And that the recommended approach was the most realistic option. “Officer time spent needs to match fees as closely as possible. This should be index linked with RPI.”
29. One of the development industry respondents “support the principle of active travel and travel plans. It is important that the success, or otherwise, of the travel plans is monitored to ensure they remain effective. The disparity across the conurbation is perplexing and we concur is in need of alignment....” However, the same development industry respondent expressed concerns regarding the financial impact to the development community. The changed approach to remove the smaller developments from inclusion addresses reduces the impact of this concern.
30. Overall, there was a recognition in multiple responses that longer time frames of monitoring were necessary, but at least one respondent highlighted that “The same fee spread over 3 years vs 7 years is quite significantly different”.

Next Steps

31. The Travel Plan Monitoring fees subject to Cabinet approval is introduced across BCP for all planning applications requiring a travel plan registered complete after the 1 April 2025. A lead in time is required to ensure that new developments can factor the additional cost into their financial assessments.
32. At the point of implementation of the harmonised Travel Plan Monitoring Fees, the existing Poole Travel Plans Supplementary Planning Guidance Document (2003) should be withdrawn.

Summary of financial implications

33. The current approach collecting financial contributions for applications in the legacy Poole area has brought in total of £23,331.68 (for 6 travel plans) since the formation of BCP. This equates to £3,888.61 per annum if averaged flatly.
34. Assuming a doubling in the number of travel plans this would potentially generate £46,663.32 over a similar six-year period. However, it is very difficult to predict the number of travel plans, and the scale of income associated likely to be generated. This is due to the reactive nature of the implementation of planning proposals where a fee is secured.
35. Both the tiered approach or the mid-market rate could track RPI to ensure Travel Plan Monitoring Fees remains in-line with inflation or be integrated into the existing fees and charges schedule and instead be reviewed on an annual basis.
36. It is recommended that RPI is used to reduce the requirement for annual reviews on the rate of increase, and that any increase remains in line with inflation but adjusted to the nearest £5 for clarity of use.
37. At the point of introduction in April 2025, the rate should be uplifted to 2025 prices using RPI to ensure that it remains current reducing current costs. This would generate a small amount of revenue for the council through the collection of monitoring fees. There is no financial risk identified.

Summary of legal implications

- 38. Section 93 of the Local Government Act 2003 is the statutory power available to the Council to charge for Travel Plan Monitoring fees. The requirement for developers to provide a Travel Plan The statute provides the power to charge for discretionary services. These are services that an authority has the power, but not a specific statutory duty to provide.
- 39. The Travel Plan fees should be published by the Council and must be on a not-for-profit basis and the Council would need to be able to demonstrate that any payment does not exceed the cost of providing the service.
- 40. The Travel Plans are linked to development and the Travel Plan fee is normally collected through a Section 106 agreement pursuant to Section 106 of the Town and Country Planning Act 1990). In addition to the payment of the Travel Plan fee the Section 106 agreement can be used to ensure that all the key elements of any approved/linked travel plan are effectively protected and to facilitate monitoring and compliance with the outcomes anticipated.
- 41. Whilst the review of the current Travel Plan Fees for the Poole area falls below the threshold that would be required for Cabinet approval, the introduction of charging schedule for Travel Plan fees for the Bournemouth and Christchurch areas would require Cabinet approval as this is considered to be the introduction of a new charging scheme rather than the harmonisation of an existing one.

Summary of human resources implications

- 42. None identified.

Summary of sustainability impact

- 43. Decision Impact Assessment outputs are overall positive (refer to Appendix E).

Summary of public health implications

- 44. None identified.

Summary of equality implications

- 45. Equality Impact Assessment: The Conversation Screening Tool was undertaken and concluded that the harmonisation of Travel Plan Fees does not have any specific impact on any protected characteristic group. Travel plans seek to ensure trips arising from new developments are wherever possible by sustainable transport including those with protected characteristics.

Summary of risk assessment

- 46. None.

Background papers

- 47. None

Appendices

Appendix A - Travel Plan Monitoring Fees Public Consultation Report

Appendix B - Travel Plan Monitoring Fees Consultation - Snap Report before option change on 11.7.2024 (162 responses)

Appendix C - Travel Plan Monitoring Fees Consultation - Snap Report after option change on 11.7.2024 (99 responses)
Appendix D - Equality Impact Assessment: Conversation Screening Tool
Appendix E – Decision Impact Assessment ID 686