

South East Dorset Transport Contributions Scheme Supplementary Planning Guidance

Contents

Executive summary	
1. Purpose.....	3
2. Introduction.....	4
3. National Policy Background.....	5
4. Local Policy Context.....	6
5. Issues and Constraints in South East Dorset.....	7
6. Delivering the Strategy	9
7. Scope.....	10
8. Planning Contributions: Methodology	11
9. Impact on development viability.....	14
10. Transport strategy and priorities for investment.....	14
11. Governance arrangements and decisions on prioritisation of spending.....	16
12. Payment of the Contribution.....	16
13. Monitoring of the Contribution	17
14. Contacts.....	17
APPENDIX A.....	19
National Policy Background.....	19
APPENDIX B.....	20
Regional, Strategic and Local Policy Background	20
APPENDIX C	22
List of general transport prerequisites for which contributions will be targeted.....	22
APPENDIX D – Process for Calculating Trip Rates and Contributions.....	
APPENDIX E - Examples of Using the Tariff.....	

Preface

This Supplementary Planning Guidance was approved by the Borough of Poole on 7 April 2009. It is expected to be adopted by the other four Authorities before the end of July 2009. It will remain in place until such time as a Planning Obligations DPD / SPD is prepared and adopted by the Councils.

Amendment 1: 8 June 2009

Executive Summary

This is the South East Dorset Transport Contributions scheme. It is a joint scheme for five Planning Authorities; Borough of Poole, Bournemouth Borough Council, Dorset County Council and East Dorset District Council. The operational area comprises Bournemouth, Christchurch, Poole and the majority of East Dorset; the scheme will operate for eighteen years from 2009/10 until 2026/27. The scheme has been designed to be compatible with the Government's emerging legislation on the Community Infrastructure Levy (CIL) which is expected to be finalised by the end of 2009.

The scheme is based on a standard tariff related to the additional transport movement caused by development. SE Dorset traffic forecasts for 2026 show that additional vehicle trips per weekday due to new residential development will be 185,700 trips, and 46,425 trips due to new non-residential development.

The tariff for 2009/10 is £713.20 per additional vehicle trip. This tariff will be updated annually, using part of the Building Construction Price Index. Examples of charges for various types of new development are:

Development	Daily Additional Trips	Tariff
1 bed dwelling	5	£3,566
2 bed dwelling	6	£4,279
3 bed dwelling	7	£4,992
4 + bed dwelling	8	£5,706
Industrial Estate	6.656 per 100m ²	£47.47 per m ²
Office (B1)	12.09 per 100m ²	£86.23 per m ²
Food Superstore	149.6 per 100m ² x 0.7	£746.86 per m ²

All charges will be calculated using the relevant trip rates from TRICS, the national database for development trip rates, and will include an allowance for public transport and cycling trips. For appropriate land uses, including retail, a reduced trip rate will be applied to exclude pass-by trips.

Expenditure of contributions will comply with the current Local Transport Plan, and will be decided by the S.E. Dorset Transport Contributions Executive Group. This Group comprises one voting Member from each of the constituent authorities, plus scrutineers and advisors, who may vote on non-financial matters only.

1. Purpose

- 1.1 This document has been jointly prepared by Dorset County Council, Bournemouth Borough Council, Borough of Poole Council, Christchurch Borough Council and East Dorset District Council in consultation with the Highways Agency and other strategic transport network authorities. It provides guidance on the level of financial contributions that will be sought from developers in South East Dorset towards implementing the transport strategies set out in both the Local Transport and Development Plan documents. These contributions will be used towards mitigating the individual and cumulative transport impacts of development proposals.
- 1.2 It summarises the policy background and need for contributions to transport infrastructure in South East Dorset, before setting out how the policies are intended to be implemented.
- 1.3 This guidance note therefore establishes a clear formula for calculating a standard charge in respect of certain transport infrastructure requirements. This will allow the local authorities to plan the necessary mitigation to enable development to proceed.

The guidance:

- Sets out the overall scope of the tariffs
- identifies the mitigation measures required to accommodate the new development, and
- establishes a reasonable level of contribution towards mitigation in the form of a standard charge.

In setting a system of local tariffs the process must be transparent and provide clear and consistent guidance to developers. This approach is supported by PPS12, Circular 05/05, Community Infrastructure Levy guidance and other best practice advice.

- 1.4 Prior to the adoption of Development or Supplementary Planning Documents, this guidance establishes the Highway and the Planning Authorities' joint position on the collection of developer contributions for transport infrastructure in South East Dorset.
- 1.5 The developer contributions collected towards transport infrastructure secured through this guidance will only be spent improving transportation in South East Dorset. The strategy's detail will inevitably change over time to reflect the prevailing transport situation both locally and nationally. Changes in Government policy, environmental constraints, scheme design issues, the development of the SED Multi model traffic model (SEDMMS), external funding streams, and other circumstances beyond the Council's control may mean that alternative solutions will need to be found to meet the objectives of the strategy. These alternative solutions will mitigate the impact of the new developments on the transport network and will complement the planned transport improvements within SE Dorset— *to improve transportation for all users throughout the area*

2. Introduction

- 2.1 New development can have a positive effect on an area, providing new homes, jobs and economic prosperity. However new development can place additional pressures on resources and infrastructure such as schools, community and leisure facilities, transport infrastructure and health services. The provision of infrastructure including a wide range of physical and social infrastructure and facilities to support new development is an essential objective of the development plan process. Government policy statements recognise that where existing infrastructure is inadequate to meet the needs of new development, it is reasonable to expect developers to contribute towards the financing of new or improved infrastructure directly related to those needs¹.
- 2.2 A good quality transport system is essential to support the local economy and the quality of life for the communities of South East Dorset. It must however be developed sensitively to protect and enhance the very special quality of the natural environment in which it is set and which is an extremely important and internationally recognised asset.
- 2.3 Current Government planning and housing policies propose to introduce over 32000 new dwellings in the Bournemouth and Poole Housing Market Area (HMA) during the 18 years to 2026, placing new challenges on all the Authorities to effectively manage the increased demand on infrastructure.
- 2.4 Developer contributions or planning obligations are intended to ensure that developers provide appropriate mitigation measures to address the impact of the proposed development. They are also intended to bring a development in line with the objectives of sustainable development as prescribed in relevant local, regional or national planning policies.
- 2.5 The Government has stated that development itself should make a greater contribution to the infrastructure costs faced by local communities² and where development creates the need for infrastructure, such development should legitimately make a contribution towards its provision.
- 2.6 At present planning obligations are typically negotiated only on large developments. In 2005 / 6 nationally only Fourteen percent of planning applications nationally lead to any planning obligations from housing³ development. However smaller developments also have a significant cumulative burden on infrastructure, yet there is no consistent way to ensure funding from such development is secured to offset this impact.
- 2.7 The Government wishes to see an approach rolled out so that all developments contribute a fair share towards future mitigating infrastructure⁴ This guidance sets out the level of financial contributions which will be sought from applications for new development where the development generates a need for new or improved transportation infrastructure and / or facilities.
- 2.8 It will be used as part of the development management process to inform planning decisions by Bournemouth, Christchurch, Dorset, East Dorset and Poole Councils, in the areas annotated as South East Dorset on Map 1. It will also form part of the emerging Local Development Frameworks (LDF) until replaced by the adoption of

¹ Circular 5/2005 Planning Obligations DCLG 2005 paragraph B3

² Community Infrastructure Levy CLG August 2008

³ Community Infrastructure Levy CLG August 2008

⁴ PPS 12 Local Spatial Plans CLG paragraph 4.12

Supplementary Planning Document's (SPD) or other local development plans covering the subject of transport infrastructure.



Map 1

3. National Policy Background

- 3.1 Current Government guidance in the form of Circular 05/2005 'Planning Obligations' advises that the adequacy of transport infrastructure is an important consideration in the granting of planning permission, and that transport improvements which are necessary in order for a development to take place can be made the subject of planning obligations, provided that the improvements are "relevant to planning, necessary to make the proposed development acceptable in planning terms⁵, directly related to the proposed development, fairly and reasonably related in scale and kind to the proposed development, and reasonable in all other respects".⁶

Planning obligations can be used to "make acceptable development which would otherwise be unacceptable in planning terms." The circular specifically encourages⁷ the application of a formulaic approach and the pooling of financial contributions in order to provide infrastructure to deal with the cumulative impacts of a number of developments to restore facilities equivalent to that existing before the development.⁸

- 3.2 Further guidance on the use of planning obligations and conditions is also contained in a number of Planning Policy Statements and Guidance. Links to relevant documents are set out in Appendix A

⁵ Circular 5/05, Planning Obligations, July 2005, CLG Paragraph B22, 33 to 35

⁶ ibid Paragraph B5,

⁷ ibid Paragraph B53,

⁸ Ibid Paragraph B16

- 3.3 The Government proposes further changes to the planning system and developer contributions through the Planning Act 2008⁹ and PPS12. These include the introduction of a Community Infrastructure Levy (CIL). This will enable local authorities to apply a levy to all new developments (residential and commercial) in their area, with the option to supplement the Community Infrastructure Levy (CIL) with a negotiated agreement, which may be required for site specific matters.
- 3.4 The CIL would be based on a costed assessment of the infrastructure requirements arising specifically out of the development contemplated by the development plan for an area, taking account of land values and potential uplifts. Standard charges would be set, which may vary from area to area and according to the nature of development proposed.
- 3.5 The Government is encouraging local Authorities to develop guidance for developers on the type and level of planning obligations that should be sought from new development based upon these principles.
- 3.6 Whilst the Government remains committed to a plan-led system, local authorities are being encouraged to introduce guidance ahead of any legislative changes¹⁰ to secure the appropriate agreements with developers to provide new community infrastructure and give as much guidance as possible to developers and landowners about the levels of contributions that will be required.

This interim guidance will provide a basis for negotiating such contributions in advance of the introduction of further legislation.

4. Local Policy Context

- 4.1 The adopted Regional Planning Guidance (RPG10), September 2001 (Policy IM1) and Bournemouth, Dorset and Poole Structure Plan (CSP28) Adopted July 2000 (Implementation Policy E), set out a strategic context for seeking planning obligations. These policies have been taken forward in more detail by Dorset's Local Planning Authorities in their adopted Local Plans.
- 4.2 These Plans are now being replaced by documents prepared under the new planning system introduced by the Planning and Compulsory Purchase Act 2004. The South West Regional Spatial Strategy (RSS) now recognises the cumulative effect of development for infrastructure, services and the need for joint working to address financial contributions and other funding streams to deliver key infrastructure¹¹ It provides the context for Dorset's Local Planning Authorities to prepare Local Development Framework documents. These documents will include policies which seek to ensure that adequate future provision is made for this necessary infrastructure and facilities.
- 4.3 Core Strategies are likely to be the first documents within the Local Development Frameworks. Core strategies will establish a spatial vision and objectives for each Authority for the period 2006-2026, as well as headline policies to deliver them. These are at an early stage of production, but a review of existing plans and strategies, early community engagement and the Sustainability Appraisal all point towards environment, affordable housing, the economy, accessibility and transportation being key issues in shaping South East Dorset over the next 20 years.

⁹ Planning Act 2008 Part 11

¹⁰ Planning Policy Statement 12 Local Spatial Planning CLG 2008

¹¹ The Draft Revised Regional Spatial Strategy for the South West 2006-2026 (2006), incorporating the Secretary of State's Proposed Changes – section 3 Development Policy D

- 4.4 The transport strategy to which contributions are being sought is based on the need for the additional infrastructure to accommodate the RSS identified growth.
- 4.5 The impact of any development in traffic terms is clearly relative to the new traffic generated by the development, and it is intended, therefore that trip rate generation be used as the means by which the scale of contribution from differing types of development will be determined

The identified transport strategy takes account of the infrastructure required to meet the demands of new development identified in the RSS, the impact a development may have beyond its immediate locality and the need for mitigation of the cumulative impact of smaller developments likely to come forward.

- 4.6 The current South East Dorset Local Transport Plan (LTP2), published in March 2006 contains an Integrated Transport Strategy (ITS) for, South East Dorset. The ITS was developed following a comprehensive review of transport needs and facilities in the area and extensive consultation.

The vision for South East Dorset set out in the LTP2 is for:

- More reliable journey times within the conurbation;
- Improved journey times between the Port, Bournemouth Airport, Town Centres, industrial areas and the national road network;
- A reduction in the number of people killed or seriously injured on the roads;
- An improved quality of life for those who don't have access to a private car;
- Increased public satisfaction with roads and footpaths;
- Transport solutions which improve economic performance;
-

Relevant links to these documents can be found in Appendix B

5. Issues and Constraints in South East Dorset

- 5.1 South East Dorset, focused on Bournemouth, Poole and Christchurch and the southern part of East Dorset district, is one of the South Coast's major urban centres. It is a key economic driver in the South West region and has a vital role in the Sustainable Communities agenda.
- 5.2 With a population of 450,000, it is the second largest urban area in the South West. It has a broad-based economy, with significant sectors specialising in tourism, education, financial services, high tech and marine industries, retailing and leisure entertainment.
- 5.3 Connectivity to London and the South East is adequate, but links to the north and the Bristol area are extremely poor quality. Its setting in internationally recognized quality countryside and coastal environment makes it unique for a conurbation of its size. It is an area that attracts people to live, learn, work, relax and retire. It has seen significant growth over many years, principally through the in-migration of both people and companies substantially from London and the South East. The strategic transportation network is defined in the LTP and comprises:

- The primary route¹² network (including the A31 Folkestone to Honiton Trunk Road)
- Bournemouth Airport,
- The Port of Poole,
The Weymouth-Waterloo electrified railway line

5.4 Growth levels for South East Dorset as set out in RSS are amongst the highest for any major urban area in the South West. This is against a context of limited opportunities for the outward expansion of the conurbation and a supporting transport infrastructure that is already strained.

5.5 The area suffers problems of peak period congestion throughout the whole highway network, and particularly on its main east-west routes. As an example the main A35 between the three town centres of Poole, Bournemouth and Christchurch carries heavy volumes of traffic with over 30,000 vehicles per day at the Poole / Bournemouth boundary and 43,000 per day on the section through Christchurch. Other sections of roads carry over 50,000 vehicles per day. With the absence of high capacity links, congestion in the area is not confined to the traditional peak hours and has spread to other times of the day.

5.6 To accommodate planned development it is essential that investment in transport and other infrastructure is made to accompany the estimated growth in travel demand. A strategy to address the transport issues is set out in the Local Transport Plan and takes into account the fact that further development across the area will invariably add further pressure and demands on the transport infrastructure. Congestion and unreliable journey times can prejudice economic success and development, as well as harm the environment and air quality. The challenge in the future is to manage economic and population growth in order to deliver economic and social wellbeing without congestion. Without suitable mitigation and infrastructure improvements there is a real danger that:

- The economy will suffer - due to increasing severity of peak congestion, with 'peak spreading' – congestion spreading out to the 0700-1000 period and the 1530-1830 period. Increased congestion over more of the day will worsen the reliability of bus services.
- The environment will suffer – due to more air and noise pollution
- Accessibility will suffer and community severance will worsen
- Road Safety will suffer -more accidents due to poor driver behaviour, and traffic diverting onto less suitable routes to avoid the congestion

5.7 The aspiration must be to create better places which allow all people in society to gain easy and safe access to everyday needs. When considered in this context, accessibility is about how places and communities function effectively. To achieve success, we need to reduce the need to travel in the first place and, where travel is needed, this should prioritise the most sustainable means.

¹² A network of A class roads designated to cater for longer distance traffic, with distinctive green signposts and a selective list of destinations. In Dorset they form the top level of the two-tier strategic highway network as there are no Motorways. Some primary routes are trunk roads, which are financed by central government directly.

6. Delivering the Strategy

6.1 The South East Dorset Local Transport Plan (2006-2011), prepared jointly by Bournemouth Borough Council, Dorset County Council and Borough of Poole, sets out four shared priorities. :

- Congestion: reducing journey times; assisting economic prosperity; reducing pollution; providing reliable journeys.
- Accessibility: providing access to services for all; opening up previously excluded areas; assisting mobility; enriching people's lives.
- Road Safety: saving lives; reducing injuries; providing reassurance to all users of the highway.
- Air Quality: providing a healthier environment; improving health; promoting cleaner transport methods.

6.2 As a means of minimising congestion and its many harmful impacts the transport strategy expresses a firm commitment to managing the transport network and locating development so as to reduce the overall need to travel within the conurbation and reduce the proportion of journeys made by single occupancy cars. Schemes which generate a high number of trips, such as large offices or major shopping centres, therefore need to be located in places that are easy to get to for a large number of people by means other than the car.

6.3 The strategic authorities Poole, Bournemouth Borough Council and Dorset County Council, have also established a Multi-Area Agreement (MAA) which sets out shared priorities for a range of partners across the wider sub-region and this should assist in delivering objectives which would not be appropriate or feasible to deliver within a single authority. Joint working is necessary to ensure consistent policies and implementation of initiatives to address the key issues of congestion, access to employment and connectivity

6.4 The transport strategy has been developed to use the limited resources available to the best advantage considering future needs and pressures aiming to address .

6.5 ;

- Reducing the Need to Travel
 - The use of travel plans on significant and large residential, commercial and education developments, park and ride, car parking strategies and enhancing public transport, walking and cycling opportunities are all examples. Park and Ride facilities and the consistent and coordinated use of Travel Plans for education facilities, large office developments and new residential developments are recognised in LTP2 as key to encouraging smarter travel choices.

Traffic and Quality of Life

- The locations which are held to be the most sustainable tend to be those which have the highest densities, the greatest mix of uses and functions, and the best accessibility levels. They are also busy places which can suffer from high volumes of road traffic. For these reasons suburban

locations are still popular places to live despite the relative lack of accessibility, because they are seen as quiet and relatively traffic-free. This highlights the importance of planning urban areas and managing our road space in ways which try to redress the balance between freedom of travel (by car) and quality of life.

Prime Transport Corridors

- Both the Regional Spatial Strategy and the South East Dorset Local Transport Plan identify Prime Transport Corridors as having an important part to play. The presence of large local centres, high frequency bus routes, proximity to heathland and opportunities for new development will all have a bearing on their ability to accommodate growth. Overall, however, the broad priorities are:
 - to facilitate economic and social regeneration initiatives;
 - to prioritise alternatives to the car where appropriate;
 - to support social inclusion priorities in more deprived areas by improving public transport access to job opportunities, services and facilities; and
 - to manage road space more effectively to minimise congestion and associated adverse impacts and provide more efficient and reliable travel times.

6.6 This strategy approach clearly supports emerging LTP3 aims and emerging national Transport Goals¹³ for :-

- Supporting Economic Growth
- Tackling Climate Change
- Contributing to better safety, security and health
- Promoting equality of opportunity
- Improving the Quality of Life

7. Scope

7.1 This guidance will apply to the whole area defined as South East Dorset with the exception of the part in the administrative area of Purbeck District Council where interim guidance is already operational¹⁴. In common with the existing strategy in Purbeck it works on the principle that development which results in a net increase in vehicle trips will make a contribution to the infrastructure needed to mitigate its cumulative impact across the conurbation as a whole.

7.2 Contributions collected as part of this guidance will be used together with other funding towards measures identified to deliver the Integrated Transport Strategy. This takes into account the infrastructure needed to accommodate the likely development levels anticipated in the RSS and corresponding Local Development Documents (LDD). Contributions are not a replacement for the provision of infrastructure which would normally be paid for by the developer as specific

¹³ Developing a Sustainable Transport System – DfT Consultation December 2008

¹⁴ Purbeck Transportation Strategy Developer Contributions Guidance: - January 2007 Dorset County Council

prerequisites needed as part of the development, for example on-site roads, immediate off-site transport infrastructure to accommodate the development, landscaping, street lighting etc. Developers will still be expected to meet these costs.

- 7.3 Developers are encouraged to make pre-application approaches to the Council, not only to discuss the merits and details of their proposal but also to clarify if there are any additional S106A /S278A ¹⁵/S38¹⁶ requirements on top of the tariffs or whether a s106 Agreement¹⁷ would be a more appropriate given the nature of the proposal.

Type of development covered by guidance

- 7.4 this guidance will apply to all types of development, with threshold levels as follows:

- residential development where there is a net increase in the number of residential units
- non-residential development of 250 sq m gfa floorspace or larger.
- other development, or change of use estimated to generate a net increase of over 5 vehicle trips per day.

- 7.5 The following exemptions will apply: -

- Applications where a S106 Agreement has already been signed and implemented and there is no change to the proposed development that would significantly increase its impact.
- Applications for “enabling” development to ensure the restoration/repair of Listed Buildings on the Councils “Building at Risk” Register
- Applications for adverts/signs, masts, tree work and other infrastructure which clearly has negligible trip generation.

Other development proposals which provide justifiable explanation for a negligible level of trip generation may have a nil contribution agreed.

- 7.6 The level of the contribution sought will depend on the extent, and nature of the development and will be derived from the tariff calculations based on standard formulae and the TRICS national data base. In some cases, the location of the development will affect the contribution sought.

- 7.7 Priorities and phasing of investment in transport are explored in more detail in Section 8 of this guidance

8. **Planning Contributions:** Methodology

- 8.1 This section explains the various assumptions made in the methodology for contributions. The detailed calculations are in Appendix D. The fundamental assumption is that cumulatively new developments give rise to additional vehicular traffic, and the scale of contribution should be proportional to the volume of that additional traffic. Sections 8.2 to 8.4 consider the additional residential and commercial development likely to arise by 2026, and the trips it will generate.

¹⁵ Section 278 A Highways Act 1980 (as amended) New Roads & Streetworks Act 1991 s23 HMSO

¹⁶ Section 38 Highways Act 1980 HMSO

¹⁷ Section 106 of the Town and Country Planning Act 1990 (amended by Section 12 of the Planning and Compensation Act 1991)

Sections 8.5 to 8.8 set out the proposed and costed transport infrastructure to cope with such an increase in development.

- 8.2 This SPG is based on the advice submitted by Dorset, Bournemouth and Poole to the SW Regional Assembly in Autumn 2005 and included in the Draft Regional Spatial Strategy, in June 2006. It identified a development rate of 1720 dwellings per annum in South East Dorset for the period up to 2026.
- 8.3 In addition to residential development the Draft RSS also identifies a need for 45,400 new jobs according to employment projections from the SW Regional Assembly, provided by Cambridge Econometrics. However, it is difficult to predict with sufficient accuracy, the amount of different types of non-residential development that will occur in South East Dorset up to 2026. Therefore, it has been assumed that 20% of the additional trips caused by development will be from non-residential land uses. The 80%/20% split of residential/non-residential trips has been remarkably consistent in South East Dorset since 1974 and has been confirmed by the 2008 surveys undertaken for the South East Dorset Multi Modal Transport Study.
- 8.4 Data from TRICS shows that the number of trips generated will vary by size of dwelling. The sizes of new dwellings expected to be built between now and 2026 is expected to be similar to the recent past which has been on average, a 2 bedroom dwelling. Hence, the number of additional trips per day from new dwellings is calculated to be 185 700 , and using the 80%/20% assumption above the number of additional trips from non-residential development is estimated to be 46425 per day. Further detailed calculations are provided in Appendix D.
- 8.5 TRICS studies show that not all the vehicle trips generated by new commercial development give rise to additional traffic on the road network. This is because some journeys will be passing by the site of the development before it is built, and will merely divert into the new development. This 'pass-by' traffic varies dependent on the type of development; it is near zero for a new employment site, is typically 30% for a retail store, and will be nearly 100% for a new petrol filling station. Therefore, the tariff rates applied need to be reduced to allow for pass-by traffic, where appropriate.
- 8.6 The SE Dorset Implementation Strategy, reported to the Regional Assembly in September 2005, provided an estimate that the cost of meeting the transport infrastructure needed to support this level of development was £400M at 2005 prices. This delivery strategy has been updated to 2008 prices, and schemes completed or no longer needed have been removed. (e.g. the new SW trains timetable introduced in 2008 means that the expected need for £10M rail service support is not needed) Schemes within Purbeck will be funded from that contributions scheme, thus are not included in the SE Dorset scheme.

Table Summary of Transport Interventions for SE Dorset 2008-2026

Transport Scheme	Total Cost 2008 Prices	SEDTCs Contribution
A31 Ameysford – Merley	£136.0m	£24.5m
Poole Regeneration Transport Network	£69.0m	£18.0m
Bus Showcase Corridors	£64.6m	£22.3m +£10m
Parley - Cooper Dean/Airport Access	£45.4m	£22.7m
Airport – A338 Link Road	£54.0m	£27.0m
Transport Packages for Urban Extensions	£21.0m	£10.5m
LTP Integrated Transport Block	£81.2m	£40.6m
Total	£471.2m	£165.6m

- 8.7 The SE Dorset Transport contributions scheme assumes that the expected shortfall in meeting the cost of major schemes will be evenly allocated so that the transport contributions scheme meets 50% of the forecast total cost of each project. For the minor schemes funded through the LTP process, it is assumed that the transport contributions scheme will supplement the currently assumed programme by 50%. There are two exceptions to this 50% principle; (i) Some contribution schemes exclude contributions to trunk roads, but due to the critical role the A31 has in the SE Dorset network, and the effects of the proposed RSS growth upon the trunk road, it is assumed that the proportion of funding for the A31 improvements from this contributions scheme will be the same as the proportion of traffic growth (to 2026) which is development related. This has been calculated as 18% using the SE Dorset traffic model jointly owned by the three strategic authorities. (ii) part of the Poole Bridges Regeneration transport network has already been completed and funding arrangements for much of the remainder are agreed. Hence the contributions scheme is only expected to meet 26% of the costs of this network. For all the other schemes in the table above the transport contributions scheme is funding 50% of the estimated total cost. (For the bus showcase corridors, a £10m developer contribution has already been committed so when added to the £22.3m in the table above, comprises 50% of the total scheme cost).
- 8.8 The Government¹⁸ expects that airport and port schemes will be funded by the private sector and that strategic rail schemes are expected to be funded by Network Rail. Only local rail schemes related to development are expected to be funded through the LTP or this transport contributions scheme.
- 8.9 The costs expected to be met by this Transport Contributions scheme are initial forecasts, and may be revised during the 2008 to 2026 period. The revisions necessary will depend on scheme delivery programmes, the level of public sector funding and decisions by the SE Dorset Transport Contributions Executive in the period up to 2026.
- 8.10 The level of contributions for various types of development are shown in the table below. The tariff is based on the additional vehicle trips generated by the development (information from TRICS) plus an allowance for passenger journeys by public transport. The tariff for residential development is based on average trip rates in South East Dorset and will apply across the area. A lower tariff for the most sustainable sites and a higher tariff elsewhere will be considered with the first review of the contributions scheme, probably in 2010. TRICS is the national trip rate database, recognised by the Department for Transport and the data comes from version 6.2.2 of 2008.

Residential	Daily Additional Trips	Tariff
1 Bed	5	£3,566
2 Bed	6	£4,279
3 Bed	7	£4,992
4 Bed	8	£5,706
Non Residential		
Industrial Estate	6.656 per 100m ²	£47.47 per m ²

¹⁸ SW RSS Panel Report Recommendation 4.7.10

Office (B1)	12.09 per 100m ²	£86.23 per m ²
Food Superstore	149.6 per 100m ² x 0.7	£746.86 per m ²
Other development types	To be based on information from the TRICS database or a relevant Transport Assessment.	

There are over thirty development types analysed in the TRICS database. Where there is sufficient data for a robust tariff to be quoted these will be added to the three non-residential development types in the table above. The next tranche of development types to be added to the table will be considered by the Transport Contributions Executive at their first meeting.

- 8.11 The contributions above apply to sites where there is no significant trip generation at present. For previously developed sites a traffic credit may apply which would be deducted from the predicted development trips. However, as the base traffic calculations are from 2008 data a traffic credit will only apply where the previous development was generating significant trips after 1 April 2008. The developer contribution will be calculated on the agreed net increase of trips resulting from new development. (See example 9 in Appendix E). The onus will be on the applicant to prove the existence of a traffic credit.

9. Impact on development viability

- 9.1 All development proposals will be expected to comply with the guidance and developers should take the requirement for contributions into account in working out the financial economics of any development proposal
- 9.2 If a developer considers that the level of obligations required would render their proposal unviable, then the developer will be expected to provide the full financial details of the proposal to the Council, in a financial appraisal submitted and signed by an appropriately qualified professional. This will be handled on a confidential basis in recognition of a developers commercial interests. For the Council to consider an “unviable” argument, it will be essential that the developer shares information substantiating this on an open book basis. If there is any disagreement on the financial appraisal the Council will expect the developer to agree to adjudication, by an independent financial body, and any costs of the adjudication funded by the developer.
- 9.3 The timing of payments and trigger points in the case of phased development will also be taken into account when considering development viability

10. Transport strategy and priorities for investment

- 10.1 Contributions provided as part of development proposals will be used to mitigate the cumulative impact of all new development, by the provision of a package of sustainable transport initiatives which benefit the SE Dorset area., The expenditure of a particular contribution will not be limited to the planning authority area where the development is located.

Potential measures anticipated as part of the transport package identified include:

- demand management and urban traffic control systems

- pedestrian and cycle routes and crossings
- variable message signing for car parks;
- public transport infrastructure and revenue support;
- Bus priority schemes and Real Time Information systems
- Public transport measures which include:
 - Kickstarting new services, or subsidising increased frequency, in development areas for an initial phase (e.g. five years) assuming that operators will eventually provide them commercially
 - Community transport schemes, set-up costs.
 - Off site infrastructure eg shelters
 - Pedestrian/cycle routes to public transport
 - Off site infrastructure which is necessary to mitigate the impact of new development by achieving a modal shift from car to public transport. This could include contributions to Bus Showcase corridors, , or rail station improvements (including parking, safety and security or information)
 - Information to employees/residents, to promote public transport use
 - Provision of ticketing deals for employees/residents;
 - scheme feasibility/preparatory costs;
 - schemes arising through the development of a travel plan linked to the development
- local and strategic highway improvements
- Associated maintenance and operational costs of the above transportation initiatives

10.2 The use of monies will be programmed according to priorities set out in the LTP and LDFs / or in agreement with the relevant LPA. Appendix C contains a list of works anticipated to be progressed in the period 2008 to 2016 to which initial contributions will contribute.

10.3 It is essential to ensure that developers can see the results of their individual contributions. Any legal agreement will therefore specify in general terms where the contributions will be used, in order to comply with the requirements of Circular 05/05, and demonstrate that the measures relate to the proposed development.

10.4 In all cases, some measures may be implemented within a different local authority from that in which the development is located, or across local authority boundaries. e.g. the proposed Park & Ride site for the Wallisdown Prime Transport Corridor is at Mannings Heath, in Poole whereas the major initial bus service will run to Bournemouth Town Centre.

11. Governance arrangements and decisions on prioritisation of spending

- 11.1 A Board of elected members representing each of the local authorities will administer the contribution in an accountable and transparent way under the guidance of officers and representatives from appropriate organisations. The Transport Contributions Executive will be similar to the Heathlands Executive, which meets in public. The only differences are (i) Purbeck are not represented on the Transport Executive, as they have an independent scheme, introduced in Jan 2007 (ii) the appropriate advisory organisations will represent transport interests..
- 11.2 The Transport contribution Board will determine the priorities for funding the programme of works identified in Appendix C. In deciding priorities they will have regard to the need to:
- Balance more expensive long term strategically significant schemes against less expensive easier to implement schemes.
 - A realistic assessment of interventions that can be implemented within the plan period¹⁹
 - Ensure that across the conurbation all areas covered by this guidance gain a fair and equitable distribution of the mitigating transportation initiatives to support the development proposals within SE Dorset .

12. Payment of the Contribution

- 12.1 A letter will be sent out by the local planning authority as part of the initial registration process, advising developers of the relevant planning policies, and the need for contributions. This will guide developers at an early stage.
- 12.2 An additional administrative charge to cover the cost of collection and distribution of the obligation will be applied at a variable rate reflecting the work involved in administering the obligation payable at the following rate:
- 1% of the total contribution where payment is received in full on or before commencement with accompanying unilateral undertaking
 - 2% of the total contribution where the proposal is the subject of a legal agreement which involves phased payments
 - Administrative payments are subject to a minimum charge of £50 and capped to a limit of £1,500 per contribution type.
- 12.3 It is expected that normally the obligation will be paid at the commencement of development, the exception being on strategically important sites delivering large numbers of residential units over a number of years where it would be unreasonable to take full payment in a single lump sum.
- 12.4 For smaller developments on infill sites, it is generally expected that the obligation will be paid on commencement. Payment may be made prior to this providing there is an accompanying unilateral undertaking or s106 agreement in place.
- 12.5 All costs (not admin) referred to in the guidance will be subject to an annual increase in April of each year, based on the BCIS All in tender price index

¹⁹ PPS 12 paragraph 4.10 recognises that timing and budgeting are key determinant on the planning and delivery of infrastructure. It advises that the test for its inclusion in development Plans should be whether there is a reasonable prospect of provision

- 12.6 Contributions will be held for 15 years to allow for the time required for the planning and delivery programmes associated with major transport schemes. If works have not progressed within 15 years of the payment, then contributions will be refunded, with interest. The amount of contribution which is repayable will also include interest calculated at a rate based upon the Bank of England Base Rate prevailing from time to time or other agreed rate.
- 12.7 The above Developer Contribution plus the administration charges are inclusive of the UK 's prevailing VAT rate.
- 12.8 The use of a standard clause for either Section 106 or unilateral agreements will be in the interests of all involved and will help speed up delivery. For the purposes of the obligation the s106 clause could be worded:

“the Transport Investment Contribution” means the sum of £[] Pounds plus an administrative fee of £ [] to be paid in full by the Owner towards measures which avoid or mitigate against any adverse effect on the South East Dorset Transport Network in accordance with the Transport Infrastructure in South East Dorset Development Contributions Interim Planning guidance.[Date] or subsequent revision thereto

- 12.9 The obligation may then be worded:

“The Owner hereby Covenants with the Council that he will not cause or permit the commencement of the development on the land until the Developer Contribution Towards Transport Investment in South East Dorset has been paid in full to the Council..”

- 12.10 The Contributions will be held separately from other accounts. The Transport Contributions Board will publish an annual report setting out the relevant Developer Contributions received and the expenditure incurred on transport infrastructure. The proposed programme of developer contributions put towards transport schemes will be monitored and audited through the existing SE Dorset Local Transport Plan financial Monitoring process.

13. Monitoring of the Contribution

- 13.1 The Local Planning authority will produce a quarterly monitoring report with information regarding the net amount contributed in total to date. The Council will produce an annual monitoring report outlining works completed, the amount left after any spending, progress in spending the contribution and plans for the next year.

14. Contacts

Dorset County Council Planning Obligations Manager (01305) 228583

Dorset County Council Group Manager: Transport Planning and Development Liaison (01305) 224570

Development Control and Forward Planning Manager Planning and Transport
Bournemouth Borough Council, (01202) 451368

Transport Policy Manager, Borough of Poole
(01202) 262040

National Policy Background

	Web Link
Circular 5/05 Planning Obligations	Circular 05/05: Planning Obligations - Planning, building and the environment - Communities and Local Government
PPS1 'Delivering Sustainable Development'.	http://www.communities.gov.uk/publications/planningandbuilding/planningpolicystatement1
Planning Policy Statement 12 (PPS12 Development Plans)	http://www.communities.gov.uk/documents/planningandbuilding/pdf/pps12lsp.pdf
PPG 13 Transport 2001	http://www.communities.gov.uk/documents/planningandbuilding/pdf/155634.pdf
Planning Obligations Practice Guide'	Planning Obligations: Practice Guidance - Planning, building and the environment - Communities and Local Government
Community Infrastructure Levy (August 2008) CLG	http://www.communities.gov.uk/documents/planningandbuilding/pdf/674479.pdf
Third Report of the Committee on Standards in Public Life 'Standards of Conduct in Local Government' July 1997 Paragraph 306	http://www.archive.official-documents.co.uk/document/cm37/3702/370208.pdf

Regional, Strategic and Local Policy Background

<p>Regional Planning Guidance for the South West (RPG 10) (2001), Government Office for the South West</p>	<p>http://www.southwest-ra.gov.uk/media/SWRA/Transport/RPG10Fulltext.pdf</p>	<p>Policy IM1</p>
<p>Draft Regional Spatial Strategy for the South West 2006-2026 (2006), South West Regional Assembly</p>	<p>SWRA - The Draft Regional Spatial Strategy</p>	<p>Paragraph 4.3.2, Development Policy D: Infrastructure For Development.</p> <p>Policy SR7.1 Sub-Regional Approach,</p> <p>Policy SR7.3 Employment Provision</p> <p>Policy 7.4 Housing Provision</p> <p>Policy SR26</p>
<p>Draft Regional Spatial Strategy for the South West 2006-2026 (2006), South West Regional Assembly Panel Report</p>	<p>SWRA - Independent Panel Report on the Examination in Public of the Draft South West RSS</p>	<p>Policy SR26</p> <p>Panel Report Recommendation 4.7.1</p>
<p>The Draft Revised Regional Spatial Strategy for the South West 2006-2026 (2006), incorporating the Secretary of State's Proposed Changes</p>	<p>Government Office South West - Regional Strategies - The Draft Revised Regional Spatial Strategy for the South West Incorporating the Secretary of States Proposed Changes</p>	<p>Paragraphs 3.6, Development Policy D, Paragraphs 4.08, 4.151 – 4.156</p>
<p>Bournemouth Dorset and Poole Structure Plan (2001) Bournemouth Borough Council Dorset County Council & Borough of Poole</p>	<p>Structure Plan</p>	<p>Implementation Policy E</p>
<p>South East Dorset Local Transport Plan 2006 -2011</p>	<p>http://www.bournemouth.gov.uk/Library/PDF/Residents/LocalTransportPlan/11.South%20East%20Dorset%20Local%20Transport%20Plan%20Policies.pdf</p>	<p>Paragraphs 9.17 -9.45</p> <p>Policies P1 – P34</p>

	Local Transport Plan	
Bournemouth Local Plan 2002	Bournemouth Local Plan 2002	Paragraph 8.60 Policy8.13 Policy8.14 Policy 8.18 Policy 8.37
Christchurch Local Plan Christchurch Local Plan 2001	Borough of Christchurch local plan 2001	Policy T18
East Dorset Local Plan 2002 Saved policies	http://212.104.140.176/media/pdf/0/q/EDDC_Saved_Policies_Request_March07.pdf	Paragraph 6.386 Policy Trans 14
Poole Local Plan first Alteration 2004	Borough of Poole Local Plan	Policies 7.59 – 61 Policy T13

List of general transport prerequisites for which contributions will be targeted

List of schemes on prime transport corridor and other integrated transport interventions expected to be delivered 2009 – 2016 to which contributions will be targeted by the Transport Contributions Board to mitigate the cumulative impact of traffic generated by new development.

The A35 Corridor between Poole and Bournemouth Town Centres

Alder Road / Ashley Road: Junction alterations and signals to provide improved Bus Priority, reduce Congestion and provide pedestrian crossing facilities

Ashley Road: Improved junction capacity at the signalised junctions of North Road, Mansfield Road and Richmond Road to provide Bus Priority and facilitate improved Air Quality, as this is an identified Air Quality “Hot Spot”

The A35 at various locations: Alter pedestrian crossings to Puffin crossings, thereby improving traffic flow and reducing Congestion;

Lindsay Road / St.Aldhelms Road junction: Right turning lane to prevent queues delaying through traffic

Lindsay Road/ Leicester Road: Traffic Signals to facilitate improved right turning on this southern route to the corridor, relieving the main A35, reducing queuing and improving safety at the junction;

Penn Hill Crossroads: Improve timings on main route and incorporate pedestrian movements, enabling the removal of the separate crossing facility;

Advanced Bus Priority facilities at some non- UTC junctions

Continued development of the RTI System introduced in 2005/06, introducing SMS messaging server and additional monitoring equipment

Continue installation of raised bus kerbs;

Development of “Micro-Corridors” to assist access to employment centres

The A3049 East-West Corridor through the centre of the conurbation

Develop Bus Priority software within the UTC scoot Network

Develop Advanced Bus Priority facilities at non- UTC junctions

Parking restraint/enforcement to reduce delays to buses

Continue installation of raised bus kerbs

Development of “Micro-Corridors” to assist access to employment centres

Bus Link from Talbot Avenue to Talbot Road and bus-gating

Introduce restriction of traffic movements at Talbot Road/ Alma Road Junction to assist bus priority;

Poole Civic Centre Bus Link

Hunger Hill – Gyratory

Marston/Bay Hog Gyratory

The A347/ A341/A3060 / B3073 /Northern Corridors

Develop Bus Priority software within the UTC scoot Network;

Continue installation of raised bus kerbs

Development of “Micro-Corridors” to assist access to employment centres;

Oakley Hill/Merley Bus priority

Christchurch

Development of “Micro-Corridors” to assist access to employment centres;

Improvements to B3073 Blackwater to Parley Cross

Develop Bus Priority software within the UTC scoot Network

Develop Advanced Bus Priority facilities at non- UTC junctions

Continued development of the RTI System

development of “Micro-Corridors” to assist access to employment centres

The A35 Corridor from the East of the Conurbation

Improvements to the Town Centre bus interchange at Gervis Place;

Bus and Cycle Lanes from Seabourne Road to Boscombe Town Centre, including partial closure of Heathcote Road

Cycle and pedestrian facilities at Lansdowne Roundabout;

East Dorset

C50 Middlehill Road, Colehill – traffic management

Wimborne Town Centre Traffic Management/ TC Enhancement.

Church Road Ferndown -traffic management

B3073 Canford Bridge. Improved pedestrian and cycle facilities north of new footbridge.

Wimborne Town centre - Stone Lane footway/cycleway to QE school

Roman Road Greenway, Corfe Mullen.

B3081 Bakers Hanging improvement

Southern Verwood Cycle Route

B3072 Three Legged Cross to West Moors – footway/cycleway

B3073 Julians Bridge – shuttle signals

Leeson Drive to Cobham Road, Cycleway/Footway.

Long Distance cycleway/trailway - north from Corfe Mullen to District Boundary

B3073 Ham Lane, - footway/cycleway (SRTS) Canford Bottom to Hampreston

B3081 Romford Bridge Verwood - realignment and footway

A348 Ringwood Road, Ferndown – Traffic Management.

C5 Wimborne Road, Lambs Green, Corfe Mullen Footway/Crossing

C156 Hurn Lane - footway extension

D41539 Leigh Lane, Wimborne. New footway east of Fairfield Close

Springfield Distributor Road

Stapehill Road - footway

Process for Calculating Trip Rates and Contributions

Residential Development

New Build

As the average house generates 6 trips per day, this number will be applied to a two-bedroom dwelling. In the case of smaller houses, a smaller trip generation will be applied, and in the case of larger houses, a larger trip generation will be applied, as follows:

1 bed dwellings:5 trips/day/2 way	5	X	=	
2 bed dwellings:6 trips/day/2way	6	X	=	£3,566.00
3 bed dwellings:7 trips/day/2 way	7	X	=	£4,279.20
4 bed dwellings and larger dwellings:8 trips/day/2 way	8	X	=	£4,992.40
				£5,705.60

Tariff figures are rounded to the nearest whole £.

Nursing Homes, Residential Homes and Sheltered Accommodation

While residents of the above accommodation would not generate traffic, staff and visitors to the home would have an impact. It is proposed that nursing homes, residential homes and other sheltered accommodation be treated as non-residential development (see below), with a Transport Assessment/Transport Statement submitted outlining number of trips based on staffing levels and possible visitors.

Planning Contributions: Non-Residential Development²⁰

Industrial Estates

An industrial estate generates 6.656 trips per 100m² per day
Contribution = £713.20 x 6.656/100 per m² = £47.47 per m²

Recreation / Tourist / Hotels / Retail / Services / Other

x /trip/day as calculated from the relevant Transport Assessment/Transport Statement to be submitted with a planning application. If a TA is not submitted then the local Highway Authority will make an assessment based on available information.

Holiday Units

Contributions will be sought for all new holiday units as per residential development This applies to both new build and converted accommodation, and includes chalets. For caravan/camping units see recreation above.

Planning Contributions: Previously Developed Sites and Renewal of Planning Permissions

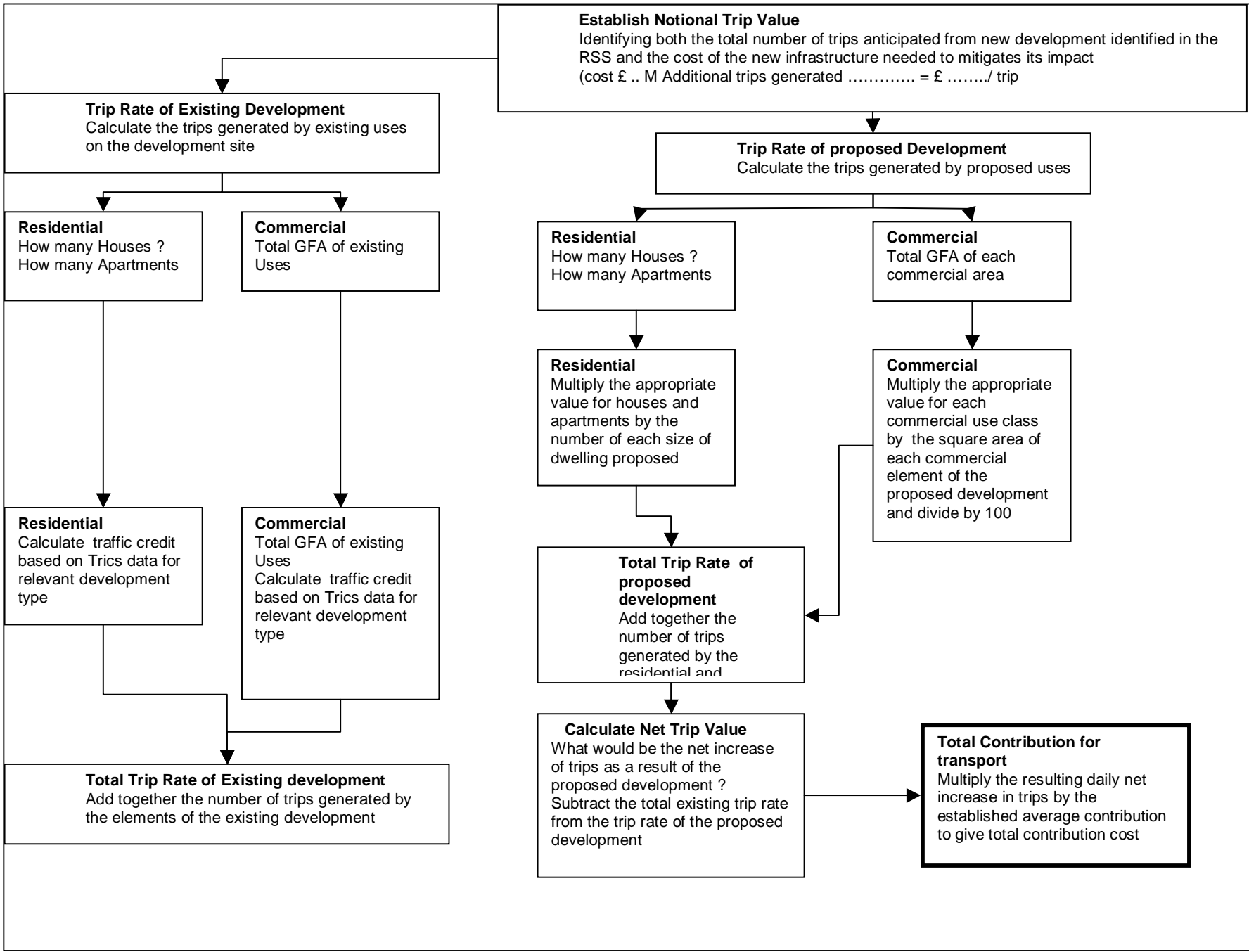
The contributions above apply to greenfield or previously undeveloped land.

Where a Transport Assessment/Transport Statement is submitted with a planning application and agreed those figures will be used to calculate the level of contribution. If a TA/TS is not submitted then the local Highway Authority will make an assessment based on available information.

For previously developed sites a traffic credit may apply which should be deducted from the development trips. The developer contribution will therefore be calculated based on the agreed net increase of trips resulting from new development. The onus will however be on the applicant to prove the existence of a traffic credit

In the case of renewal of planning permission, the contribution policy will apply as if the application was newly submitted.

²⁰ Those developments submitting a Travel Plan, for example as part of their Transport Assessment, might be able to demonstrate some decrease in trip-making.



Examples of Using the tariff

Examples 1-4 are residential, 5-7 are non-residential. Example 8 explains the three types of transport improvement; 'on-site' 'access', and 'wider network'.

Example 9 explains "traffic credit" in more detail.

Example 1:

A developer proposes to demolish a 3 bedroom bungalow on a large plot and replace it with 4 detached houses, 2 with 3 bedrooms, 2 with 4 bedrooms. The transport tariff will give credit for existing residential uses, so a 3 bedroom dwelling would have a credit of £4992. Hence the tariff payable is $2 \times £4992 + 2 \times £5706 - £4992 = £16,404$.

Example 2:

A developer proposes to demolish a 5 bedroom house and replace it with 6 2-bedroom flats. The developer argues that the house generated as much traffic as 3 2-bedroom flats, so he should only have to pay the tariff for 3 new dwellings. The transport tariff will give credit for existing residential uses, but doesn't differentiate between houses and flats, and the relevant tariff is for 4+ bedrooms: £5,706. Hence the tariff payable is $6 \times £4,279 - £5,706 = £19,968$.

Example 3:

A householder proposes a large extension to his house to accommodate his daughter and her children. Two extra car parking spaces are also proposed. The development is exempt from the tariff.

Example 4:

A developer proposes 200 new 2 bedroom flats on a derelict site in Poole Town Centre. The developer argues that, due to the location, the development will generate far less vehicle movement than the 6 trips per flat per day assumed in the standard tariff, because there will be more bus use. The standard tariff applies; ($200 \times £4279 = £855,800$) because it includes an allowance for bus and cycle trips too, and improvements for these modes need public funding. If housing developments in the most sustainable locations paid a lower tariff then those elsewhere would have to pay a higher tariff.

Example 5:

A superstore operator proposes to extend an existing 4000m² store by 2500m². The standard tariff for this development is $25 \times 150 \times £713.20 = £2,674,500$. However, as part of a Transport Assessment the applicant proves, to the satisfaction of the highway authority, that the additional daily trips will be less than half those assumed by the tariff. A reduced sum of £1,200,000 is agreed by the local planning authority, based on the evidence received.

Example 6:

A developer proposes a new 15000m² group of industrial buildings, use class B2. The standard tariff for the development is $150 \times 7.5 \times £713.20 = £802,350$.

Example 7:

A small local convenience store is converted to a Tesco Metro. Planning consent is required for new illuminated signs and a 150m² extension. There is considerable evidence that Tesco stores attract far more traffic than other operators. However, this example would be considered de minimis, and no tariff would be sought, unless the highway authority could demonstrate a probable net increase of more than 5 vehicle trips/day.

Example 8:

A large mixed use development is proposed between two main roads. The developer proposes to build a new spine road serving the development, linking to a new priority junction (costing £100,000) on one main road, and a new signalled junction with bus lanes and a Toucan crossing (total cost £700,000) on the other main road. The developer accepts that the standard tariff for his proposal is £2,000,000 but seeks a reduction for his proposed transport expenditure. The new spine road, the internal road and cycle/footway network are "on site", and for the development only. Of the two "access" proposals, the £100,000 priority junction is required for the development and has no significant "wider network" benefits. However, the highway authority assesses that the new signalled junction with bus lanes and a Toucan crossing (£700,000 to be paid by the developer) provides significant network benefits £400,000 greater than those which could reasonably be expected to mitigate the development. Accordingly the tariff payable is reduced by £400,000 to £1,600,000.

Example 9:

A developer proposes to replace a run-down retail warehouse with 150 flats. The warehouse generates 250 trips per day but the developer argues that it used to have 1500 trips per day, and this should be the 'traffic credit'. Traffic credit for non-residential development will only be given for operations in existence after 1 April 2008, where reliable, detailed, evidence of average traffic movements is provided. (A traffic survey on one day is not sufficient.) The 'traffic credit' for 250 trips per day is £713.20 x 250 = £178,300.