

## Design Manual for Roads and Bridges



General Principles and Scheme Governance  
General information

# GG 142

## Walking, cycling and horse-riding assessment and review

(formerly HD 42/17)

Revision 0

### Summary

This document sets out the walking, cycling and horse-riding assessment and review (WCHAR) process for highway schemes on motorways and all-purpose trunk roads.

### Application by Overseeing Organisations

Any specific requirements for Overseeing Organisations alternative or supplementary to those given in this document are given in National Application Annexes to this document.

### Feedback and Enquiries

Users of this document are encouraged to raise any enquiries and/or provide feedback on the content and usage of this document to the dedicated Highways England team. The email address for all enquiries and feedback is: [Standards\\_Enquiries@highwaysengland.co.uk](mailto:Standards_Enquiries@highwaysengland.co.uk)

**This is a controlled document.**

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## Release notes

| Version | Date     | Details of amendments   |
|---------|----------|---|
| 0       | Nov 2019 | GG 142 replaces HD 42/17. This full document has been re-written to make it compliant with the new Highways England drafting rules. |

## **Foreword**

### **Publishing information**

This document is published by Highways England.

This document supersedes HD 42/17, which is withdrawn.

### **Contractual and legal considerations**

This document forms part of the works specification. It does not purport to include all the necessary provisions of a contract. Users are responsible for applying all appropriate documents applicable to their contract.

## Introduction

### Background

This document sets out the walking, cycling and horse-riding assessment and review (WCHAR) process for highway schemes on motorways and all-purpose trunk roads.

It defines the applicable highway schemes and stages in the highway scheme development process at which walking, cycling and horse-riding assessments and reviews are needed, together with the process requirements.

The purpose of this document is to facilitate the inclusion of all walking, cycling and horse-riding modes in the highway scheme development process from the earliest stage, enabling opportunities for new or improved facilities and their integration with the local and national network(s). This could include the creation and/or improvement of facilities for pedestrians, cyclists and equestrians that are separate from the highway.

WCHAR is intended to provide increased collaboration, interaction and engagement with key stakeholders.

The WCHAR process is not an independent audit of walking, cycling and horse-riding matters related to the highway scheme.

The competencies expected of the Lead Assessor responsible for leading this work are set out in Section 3 of this document.

The process is made up of two distinct parts - the assessment and review.

The aims of carrying out a walking, cycling and horse-riding assessment are:

- 1) to gain an appropriate understanding of all relevant existing facilities for pedestrians, cyclists and equestrians (users) in the local area;
- 2) to provide background user information that can be referred to throughout the development of the highway scheme;
- 3) to identify opportunities for improvement for users.

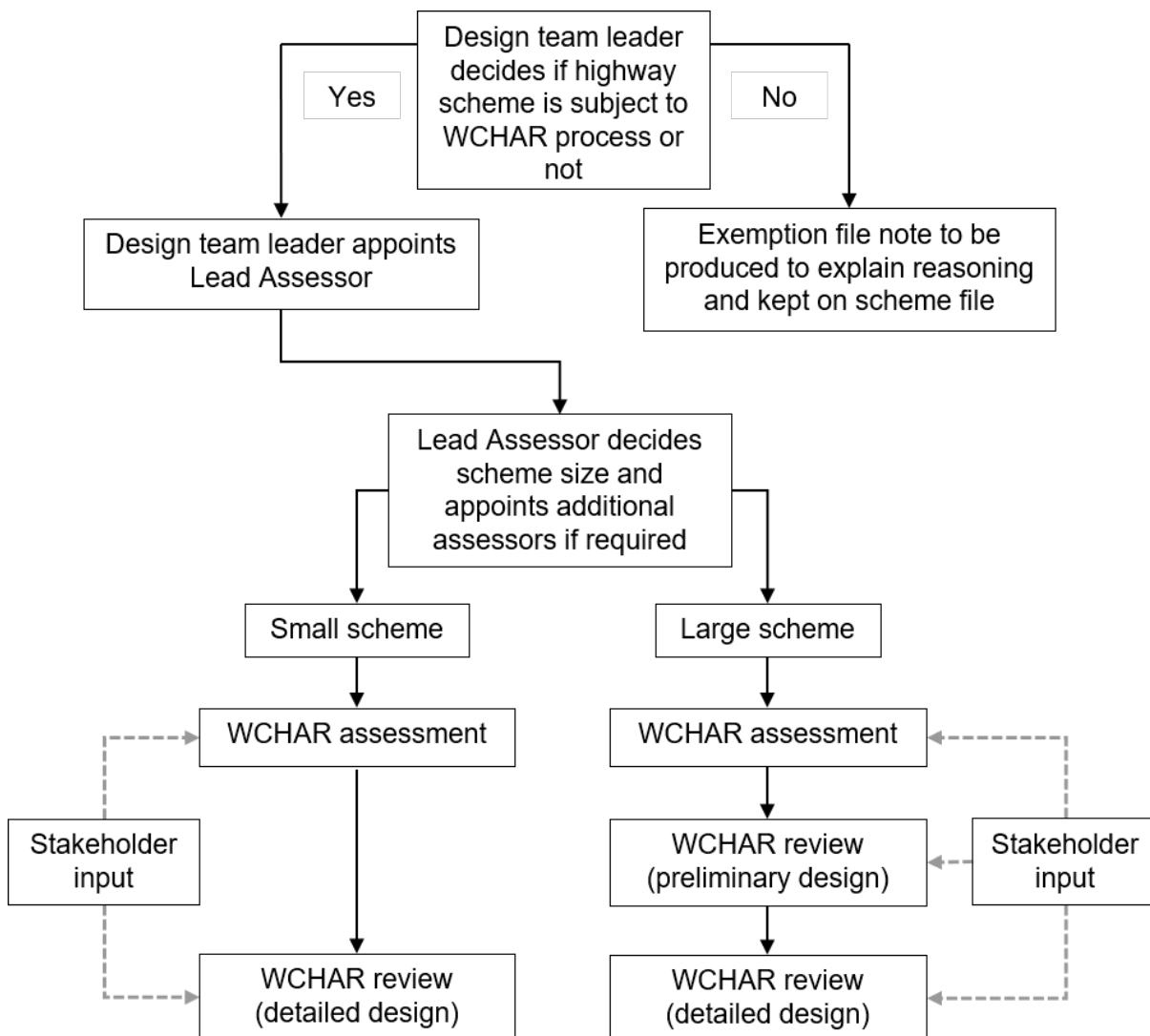
The aims of carrying out a walking, cycling and horse-riding review are:

- 1) to continually review proposals for pedestrians, cyclists and equestrians throughout the development of the highway scheme design;
- 2) to review the potential impact of the proposed highway scheme on users in the area and on existing facilities;
- 3) to identify new opportunities for improvement (or removal of constraints) for users that may arise from the development of the highway scheme that were not evident during the assessment phase.

The process concludes prior to the commencement of construction of a highway scheme.

The WCHAR process is summarised in the WCHAR process summary:

**WCHAR process summary**



**Assumptions made in the preparation of this document**

The assumptions made in GG 101 [Ref 1.N] apply to this document.

## Abbreviations

### Abbreviations

| Abbreviation | Definition  |
|--------------|---|
| RSA          | Road safety audit                                       |
| WCHAR        | Walking, cycling and horse-riding assessment and review |



## Terms and definitions

### Terms and defintions

| Term  | Definition  |
|---|---|
| Assessment and review team                              | <p>The team of Lead Assessor and any additional appointed assessors who are responsible for undertaking the assessment and/or review.</p> <p>NOTE: Also referred to as 'assessment team' and 'review team' for appropriate stages of the WCHAR process.</p>   |
| Assessor  | <p>A practitioner who is appointed to assist the Lead Assessor.</p> <p>NOTE: More than one assessor can be appointed by the Lead Assessor.</p>  |
| Design team leader                                      | <p>A person within the design organisation responsible for the development of the highway scheme and who performs a role other than Lead Assessor for the same highway scheme.</p> <p>NOTE: The design team leader can be known by other titles in some cases, therefore design team leader is a collective term.</p> |
| Lead Assessor   | <p>An appointed and competent practitioner who is responsible for the completion of the WCHAR process in accordance with this document. The Lead Assessor provides specific advice on the provision for pedestrians, cyclists and equestrians within a highway scheme.</p>  |
| Third party organisation-led highway scheme             | <p>A highway scheme that is promoted by a developer or third party organisation that has an impact on the motorway or all-purpose trunk road network.</p>   |
| Walking, cycling and horse-riding assessment            | <p>The first part of the WCHAR process.</p> <p>NOTE: Also referred to as 'the assessment' within this document.</p>   |
| Walking, cycling and horse-riding assessment and review | <p>The overall process for the assessment and review of walking, cycling and horse-riding facilities within the highway scheme development process.</p>   |
| Walking, cycling and horse-riding assessment report     | <p>The document output of the assessment.</p>   |
| Walking, cycling and horse-riding review                | <p>The second and final part of the WCHAR process.</p> <p>NOTE: Also referred to as 'the review(s)' within this document.</p>   |
| Walking, cycling and horse-riding review report         | <p>The document output of the review(s).</p>  |

**Terms and definitions** (continued)

| <b>Term</b>                             | <b>Definition</b>   |
|---|---|
| Walking, cycling and horse-riding users | <p>Users that include:</p> <ol style="list-style-type: none"> <li>1) pedestrians - including mobility impaired and vulnerable pedestrians;</li> <li>2) cyclists - including mobility impaired and vulnerable cyclists; and</li> <li>3) equestrians - including mobility impaired and vulnerable equestrians.</li> </ol> <p>Other users to be considered as part of this process include (but not limited to):</p> <ol style="list-style-type: none"> <li>4) scooter riders (non-motorised);</li> <li>5) cyclists with electrically assisted pedal cycles (where these conform to Department for Transport or other relevant regional regulations and where they can legally be used); and</li> <li>6) users of powered wheelchairs (where these conform to Department for Transport regulations and where they can legally be used).</li> </ol> |
| WCHAR study area                        | An area surrounding a highway scheme that the Lead Assessor has determined as being relevant to the WCHAR process.  |

## 1. Scope

### Aspects covered

- 1.1 This document shall be used for all highway schemes on the motorway and all-purpose trunk road network.
- 1.2 Highway schemes shall be exempt from the requirements of the assessment and the review phases of the WCHAR process where:
- 1) they are located entirely within the extents of existing roads for which motorway regulations apply;
  - 2) they are located entirely within the extents of existing roads where pedestrians, cyclists and equestrians are not permitted;
  - 3) they have no impact on pedestrians, cyclists and equestrians, and where this can be clearly demonstrated prior to commencing the WCHAR process.
- 1.3 Where the assessment and review phases are not applied to a highway scheme, as a result of a valid exemption, the design team leader shall record this decision on an exemption file note to be kept on record in the project file.

*NOTE 1 The design team leader determines the applicability of the WCHAR process on a scheme-by-scheme basis.*

*NOTE 2 Appendix A provides an exemption file note template.*

- 1.4 Ex-vehicle pedestrians, such as those using a lay-by or emergency refuge area, shall be exempt from the WCHAR process as their primary mode of travel to a particular location on the motorway and all-purpose trunk road network is vehicular.
- 1.5 The assessment and review phases of the WCHAR process shall apply to the pre-construction activities associated with a highway scheme.

*NOTE The WCHAR process concludes before the construction phase of a highway scheme and no further assessment or review applies post-construction.*

### Developer-led and third party organisation-led highway schemes

- 1.6 Where developer-led and third party organisation-led highway schemes impact on the motorway and all-purpose trunk road network, this document shall be applied.

### Implementation

- 1.7 This document shall be implemented forthwith on all highway schemes involving walking, cycling and horse-riding on the Overseeing Organisations' motorway and all-purpose trunk roads according to the implementation requirements of GG 101 [Ref 1.N].

### Use of GG 101

- 1.8 The requirements contained in GG 101 [Ref 1.N] shall be followed in respect of activities covered by this document.

## 2. WCHAR process

### Appointment

2.1 A Lead Assessor shall be appointed by the design team leader to undertake the WCHAR process.

*NOTE The competencies expected of a Lead Assessor can be found in Section 3.*

### WCHAR highway scheme size

2.2 The Lead Assessor shall determine the highway scheme size for the WCHAR process.

2.2.1 Table 2.2.1 should be used to determine whether a large or small highway scheme process is applied.

**Table 2.2.1 Large and small highway scheme process criteria**

|                             |  |
|-----------------------------|--|
| <b>Large highway scheme</b> | Highway schemes comprising new road construction (including new motorways), significant changes to an existing all-purpose trunk road or significant changes to an urban environment consisting of both the trunk road network and local highway network. In addition, any scheme aimed principally at providing for pedestrians, cyclists or equestrians. |
| <b>Small highway scheme</b> | Highway schemes comprising minor changes to an existing all-purpose trunk road, or changes to existing motorway or trunk road junctions that affect the local highway network in a rural area.   |

*NOTE Table 2.2.1N provides example highway schemes for large or small highway scheme classification.*

**Table 2.2.1N Example large and small highway schemes**

| <b>Example large highway schemes</b>   | <b>Example small highway schemes</b>  |
|--|---|
| New motorway or all-purpose trunk road construction or major modification of an existing trunk road or motorway junction.  | Minor rural all-purpose trunk road or motorway junction improvements.   |
| All-purpose trunk road or motorway junction upgrade in existing urban area.  | Changes to lane markings, priorities or widths on existing all-purpose trunk roads.   |
| New town or village bypass.  | Urban all-purpose trunk road schemes that do not involve changes to the road layout.  |
| Creation of footway, shared use path or cycle track alongside or crossing an existing all-purpose trunk road.  | Highway schemes that solely involve changes to speed limits on all-purpose trunk roads.   |
| Motorway schemes that could affect pedestrians, cyclists and equestrians where the scheme extends as far as the non-motorway network at the end of the slip roads or overbridges, for example. | Emergency motorway diversion signing schemes that involve diverting traffic onto roads where pedestrians, cyclists or equestrians can be present and/or affected. |
| Route-based improvements on a rural all-purpose trunk road.  | Changes to signs aimed at pedestrians, cyclists and equestrians.  |
| Urban all-purpose trunk road schemes involving changes to the road layout.   | Highway schemes affecting lay-bys, including the creation of new lay-bys on the all-purpose trunk road network.   |
| Major rural all-purpose trunk road junction improvements.  | Structures schemes affecting a route that could be used by pedestrians, cyclists and equestrians (e.g. motorway bridge parapet replacement).                      |
|  | All-purpose trunk road speed control schemes (such as horizontal/vertical physical measures, signs).  |
|  | Stand-alone crossings.  |

### 3. Assessment and review team competency

#### Lead Assessor role

3.1 The Lead Assessor shall co-ordinate the WCHAR process and the resources required to deliver this.

*NOTE The Lead Assessor is an integral part of the team appointed by the design team leader to deliver the highway scheme.*

3.1.1 The Lead Assessor should have the expected competencies as set out in Table 3.1.1.

**Table 3.1.1 Lead Assessor expected competencies**

|   |
|---|
| <b>Background</b>   |
| Knowledge of walking, cycling and horse-riding policies within the UK.  |
| Knowledge of the needs of each user group: pedestrians; cyclists; equestrians; and the various sub-groups of these.   |
| Knowledge of current best practice in infrastructure design for all user groups.  |
| Knowledge of the planning and operation of walking, cycling and horse-riding networks.  |
| Knowledge of potential issues created by facilities that provide for a combination of users.  |
| Experience of managing stakeholder consultation events.   |
| Experience of managing conflicting stakeholder views and expectations.  |
| Experience of working on the all-purpose trunk road and motorway network.   |
| Experience of designing facilities for pedestrians, cyclists and equestrians.   |
| Experience of completing feasibility studies and assessment of walking, cycling and horse-riding infrastructure design.   |
| <b>Assessment competencies</b>  |
| Experience of identifying key trip generators and subsequent desire lines for pedestrians, cyclists and equestrians.  |
| Experience of the analysis and subsequent interpretation of survey data such as pedestrian count data and automatic cycle count data.   |
| Experience of assessing existing routes and facilities used by pedestrians, cyclists and equestrians including condition surveys performed during site visits.                              |
| Experience of collision data analysis in the context of providing facilities for pedestrians, cyclists and equestrians.   |
| Experience of identifying viable and proportionate opportunities for the improvement of facilities for pedestrians, cyclists and equestrians.   |
| Knowledge of transport networks and their operation, including the opportunities and issues arising from potential multi-modal transport options for pedestrians, cyclists and equestrians. |
| <b>Review competencies</b>  |
| Experience of presenting options to key stakeholders and promoting the various benefits and dis-benefits of options.  |
| Experience of working as part of a wider design team(s) in order to present and discuss options for enhancing the design for all user groups.   |

#### Assessment and review team

3.2 The WCHAR assessment and review team shall include a Lead Assessor.

3.2.1 The Lead Assessor may appoint additional assessors.

*NOTE Appointing additional assessors can be beneficial where there is anticipated high workload, such as on large highway schemes.*

3.3 The Lead Assessor and any additional appointed assessors shall record their involvement and specified role in the WCHAR process through the assessment and review report documentation.

3.3.1 An assessor(s) appointed by the Lead Assessor should have, in the Lead Assessor's professional opinion, relevant knowledge and experience for the task they are being asked to undertake.

3.4 Members of the WCHAR assessment and review team shall not be permitted to be members of the road safety audit (RSA) team for the same highway scheme.

*NOTE Members of the WCHAR assessment and review team are not permitted to be members of the RSA team in order to maintain the independence of the RSA team.*

## 4. Walking, cycling and horse-riding assessment

### General

- 4.1 The assessment shall be applied to large and small highway schemes.
- 4.2 The assessment shall be completed during the options or concept stage of a highway scheme where this exists.
- 4.3 Where an options or concept stage does not exist, the assessment shall be completed before the end of the preliminary design stage.
- 4.4 The output of the assessment shall comprise an assessment report.

*NOTE* An assessment report template can be found in Appendix B.

- 4.5 Opportunities for new or improved facilities for walking, cycling and horse-riding users shall be identified at the assessment phase and recorded within the assessment report.

*NOTE 1* Identified opportunities for improvement of walking, cycling and horse-riding facilities do not always need to be restricted to the highway scheme extents.

*NOTE 2* In some cases, improvements to facilities outside the limits of the highway scheme can result in greater improvements for users than an attempt to incorporate dedicated facilities within the highway scheme extents.

### Walking, cycling and horse-riding assessment report - information

#### WCHAR study area

- 4.6 The Lead Assessor shall define a WCHAR study area on a scheme-by-scheme basis.
- 4.6.1 The WCHAR study area should typically extend 1km surrounding a small highway scheme and 5km surrounding a large highway scheme.

#### Report information summary

- 4.7 The minimum information to be included in assessment reports shall be in accordance with Table 4.7.



**Table 4.7 Information requirements for large and small highway schemes**

| <b>Assessment and summary of</b>   | <b>Large highway scheme</b> | <b>Small highway scheme</b> |
|--|-----------------------------|-----------------------------|
| Walking, cycling & horse-riding policies and strategies within or related to the WCHAR study area. | Yes                         | Yes                         |
| Personal injury collision data.  | Yes                         | Yes                         |
| Multi-modal transport service and interchange information within the WCHAR study area.             | Yes                         | Yes                         |
| Key trip generators and local amenities within the WCHAR study area.                               | Yes                         | Yes                         |
| Information gathered during site visit.  | Yes                         | Yes                         |
| Information gathered during liaison with key stakeholders.   | Yes                         | Yes                         |
| Existing walking, cycling and horse-riding network facilities within the WCHAR study area.         | Yes                         | Yes                         |
| Walking, cycling and horse-riding user survey data.  | Yes                         | <b>No</b>                   |
| Information gathered during liaison with local user groups and wider public.                       | Yes                         | <b>No</b>                   |

- 4.7.1 The Lead Assessor should determine the appropriate quantity of the information to be captured, such that only information which can be used to help inform the highway scheme design is collated.

#### **Assessment of walking, cycling and horse-riding policies and strategies**

- 4.8 The assessment report shall contain an analysis of walking, cycling and horse-riding policies and strategies relevant to the WCHAR study area.
- 4.8.1 Walking, cycling and horse-riding policies and strategies should be used to help inform the identification of opportunities for improvement of walking, cycling and horse-riding facilities.

#### **Collision data**

- 4.9 Personal injury collision data shall be obtained for the latest available period and include a minimum period of three years of data.
- 4.9.1 Personal injury collision data should not be limited to pedestrian, cyclist and equestrian collisions.
- 4.10 Personal injury collision data shall be analysed to identify any collision cluster sites and trends that can influence or impact the highway scheme.

*NOTE Analysis of personal injury collision data allows the identification of existing problems which can discourage use of a particular site by pedestrians, cyclists and equestrians.*

- 4.10.1 Where damage-only collision data is available it should be analysed to identify trends that could currently discourage walking, cycling and horse-riding.

*NOTE Damage-only collision data can allow the identification of issues and thus improvements that can otherwise go undetected when analysing only personal injury collision data.*

#### **Multi-modal transport service and interchange information**

- 4.11 Multi-modal transport services, associated infrastructure and interchanges within the WCHAR study area shall be identified and recorded.

*NOTE Multiple modes of transport can be used by pedestrians, cyclists and equestrians as part of a longer trip.*

4.11.1 Access to and from multi-modal transport services, interchanges and facilities should be assessed in the context of the proposed highway scheme.

4.11.2 Destinations for multi-modal transport services, together with their frequencies and interchange facilities, should be identified and assessed as part of the assessment.

#### **Key trip generators and local amenities**

4.12 The assessment shall include an analysis of local trip generators and amenities in the WCHAR study area to identify likely desire lines for pedestrians, cyclists and equestrians.

4.12.1 The assessment should include an assessment of committed future development in the WCHAR study area, including any improvements to multi-modal transport services, interchanges and facilities.

#### **Site visits**

4.13 The Lead Assessor shall conduct a site visit to the WCHAR study area during the assessment.

4.13.1 The scope of a site visit should be determined by the Lead Assessor.

*NOTE It is not necessary to include a site visit to all routes within the WCHAR study area where there is no relevance to the highway scheme or crossing points.*

4.13.2 The Lead Assessor should be accompanied by any additional assessor(s) that have been appointed.

*NOTE A site visit allows the Lead Assessor and assessor(s) to identify opportunities that can be missed from online mapping or other sources of desktop data collection and are therefore an important part of the assessment.*

4.13.3 The specific timing of a site visit should be determined by the Lead Assessor.

4.13.4 The specific timing of a site visit should be influenced by the proximity of certain trip generators such as schools where the morning and afternoon peak periods are more relevant (due to higher anticipated user flows).

*NOTE A site visit during hours of darkness can be beneficial in identifying additional hazards and issues, particularly on urban commuter routes which are likely to be in darkness in the winter months at peak commuting times.*

#### **Liaison with key stakeholders**

4.14 The assessment report shall contain a record of liaison with key stakeholders to understand their specific needs and concerns.

4.14.1 Liaison with key stakeholders should include representatives for walking, cycling and horse-riding from all local authorities for which the highway scheme is within or extends across their boundaries.

4.14.2 Liaison with key stakeholders other than local authorities should be determined by the Lead Assessor in the context of the highway scheme.

*NOTE Key stakeholders other than local authorities can include walking, cycling and horse-riding organisations as well as disability groups, local businesses and transport operators.*

#### **Existing walking, cycling and horse-riding facilities**

4.15 An assessment of the existing walking, cycling and horse-riding facilities within the WCHAR study area shall be undertaken.

4.15.1 The assessment of the existing walking, cycling and horse-riding facilities should include the current condition and effectiveness where these are deemed relevant to the highway scheme in the Lead Assessor's professional opinion.

*NOTE It is not necessary to report on the condition of all facilities within the WCHAR study area where these are not relevant to the highway scheme.*

4.15.2 The existing walking, cycling and horse-riding facilities deemed relevant to the highway scheme, in the Lead Assessor's professional opinion, should be assessed in isolation for each mode of travel.

*NOTE The interaction of each mode can be studied at the review phase of the process.*

4.16 The assessment of existing walking, cycling and horse-riding facilities shall include information on all of the main walking, cycling and horse-riding strategic networks within or connecting to the WCHAR study area for large highway schemes.

*NOTE Assessment of strategic walking, cycling and horse-riding networks can include a county-wide or a town/city-wide area for large highway schemes.*

4.17 Where gaps in existing walking, cycling and horse-riding strategic networks are identified within the WCHAR study area for large highway schemes, these shall be recorded so that opportunities for improvement and/or betterment can be identified.

*NOTE 1 Walking, cycling and horse-riding strategic networks can include National Cycle Network (NCN) routes, public rights of way, bridleways and byways open to all traffic.*

*NOTE 2 A crucial element of the strategic network assessment is to establish the longer term plans for county-wide and town/city-wide strategic networks.*

#### **Walking, cycling and horse-riding survey data for a large highway scheme**

4.18 The assessment report for a large highway scheme shall contain an analysis of any existing walking, cycling and horse-riding survey data where this is available within the WCHAR study area (and if collected within the previous 12-month period).

*NOTE The survey data can provide information such as likely desire lines and usage figures that can assist in the completion of the assessment.*

4.19 Where walking, cycling and horse-riding survey data collected within the previous 12 month period does not already exist, it shall be obtained for a large highway scheme.

4.19.1 Walking, cycling and horse-riding survey data should include usage figures for pedestrians, cyclists and equestrians.

4.19.2 The Lead Assessor should determine the type of survey data to be collected.

4.19.3 The Lead Assessor should assess the latent demand potential by examining existing usage patterns and likely trip generators in the WCHAR study area and through local key stakeholder liaison.

#### **Liaison with local user groups and wider public for a large highway scheme**

4.20 The assessment report for a large highway scheme shall include records of local group liaison relevant to the WCHAR study area except where wider public or local user group involvement is not, in the Lead Assessor's professional opinion, deemed appropriate.

4.20.1 Where the Lead Assessor deems it relevant to liaise with the wider public, this should be undertaken during the assessment.

#### **Reporting of different user groups**

4.21 The assessment report shall demonstrate that the needs of all user groups have been identified and evaluated.

#### **Report approval**

4.22 The assessment report shall be signed by both the Lead Assessor and the design team leader.

*NOTE 1 The Lead Assessor signs the assessment report to confirm that it contains appropriate walking, cycling and horse-riding information for the development of the highway scheme design, and has been completed in accordance with this document.*

*NOTE 2* The design team leader signs the assessment report to confirm that the process has been completed at the appropriate time and that the competency of the Lead Assessor has been reviewed in accordance with Section 3 of this document.

4.23 The signed assessment report shall be kept on the highway scheme file.

*NOTE* The assessment report is not forwarded for approval to the Overseeing Organisation.

## 5. Walking, cycling and horse-riding review

### General

- 5.1 The review shall be undertaken as an ongoing process during the design stages of the highway scheme (but after the completion of the assessment report).
- 5.2 The assessment and review team shall record the design decisions relating to the provision of walking, cycling and horse-riding facilities.
- 5.3 The minimum output of the review shall be in accordance with Table 5.3.

**Table 5.3 Minimum WCHAR review outputs**

|                              |   |
|------------------------------|---|
| <b>Large highway schemes</b> | Two review reports:<br>1) a review report at the end of the preliminary design stage and before commencement of detailed design; followed by<br>2) a review report at the end of the detailed design phase (before construction commences). |
| <b>Small highway schemes</b> | A single review report at the end of the detailed design phase (before construction commences) that contains a record of all decisions from the preliminary and detailed design stages.   |

*NOTE* A review report template can be found in Appendix C.

- 5.3.1 Where the Lead Assessor deems it necessary, in their professional opinion, an additional review report may be produced at the preliminary design stage of small highway schemes.

*NOTE* Identification of opportunities for improvement of walking, cycling and horse-riding facilities at the review phase do not always need to be restricted to those that can be delivered within the context of the highway scheme.

- 5.4 Where a highway scheme is delayed by more than 12 months between the assessment and review phases, the assessment report shall be revisited and re-issued to take account of any changes prior to the review being undertaken.

- 5.4.1 As the assessment and review team can change between the assessment and review phases of the process, the following items should be confirmed by the Lead Assessor in order for the review to be able to take place:

- 1) completion of an assessment report within the last 12 months since the commencement of the review phase;
- 2) the stated highway scheme size is still relevant; and
- 3) the assessment report has been signed by the Lead Assessor and the design team leader.

### Walking, cycling and horse-riding review report - information

#### Review of assessment report

- 5.5 Opportunities for improvement identified in the assessment report shall be reviewed during the review phase(s) and included within the review report.

#### Review of previous review report

- 5.6 For large highway schemes, opportunities for improvement identified in the preliminary design stage review report shall be reviewed during the detailed design stage and included within the detailed design stage review report.

**Review of highway scheme proposal**

5.7 Highway scheme design drawings and associated information shall be reviewed at the preliminary and/or detailed design stages to:

- 1) ensure that previously identified opportunities at the assessment phase have been taken into account and implemented where achievable; and
- 2) identify opportunities for improvement for pedestrians, cyclists and equestrians as a result of the developing highway scheme design.

5.7.1 Each mode of travel (walking, cycling and horse-riding) should be reviewed in isolation and then in the context of other users.

**Liaison with key stakeholders**

5.8 The Lead Assessor shall determine the need for further liaison with key stakeholders during the review phase and record the outcomes in the review report.

5.8.1 Liaison with key stakeholders at the review phase should be targeted in order to prevent unnecessary delay to a highway scheme or a repetition of liaison at the assessment phase.

*NOTE Liaison with key stakeholders at the review phase can be useful in identifying new opportunities and reviewing any opportunities resulting from the progression of the highway scheme design.*

**Site visits**

5.9 A further site visit to the study area shall be undertaken if this is deemed necessary by the Lead Assessor.

**Actions taken to implement opportunities**

5.10 Where opportunities to improve or introduce new facilities for pedestrians, cyclists or equestrians have resulted in changes to the highway scheme design, the actions taken to implement the opportunities shall be recorded in the review report.

5.11 Where opportunities to improve or introduce new facilities for pedestrians, cyclists or equestrians have been identified but not implemented, the reasoning for this shall be recorded in the review report.

**Reporting of different user groups**

5.12 The review report shall include a section for each user group (pedestrians, cyclists and equestrians as well as sub-groups within each group) to demonstrate that the needs of those groups identified in the assessment report have been addressed.

**Report approval**

5.13 The review report shall be signed by both the Lead Assessor and the design team leader.

*NOTE 1 The Lead Assessor signs the review report to confirm that opportunities for users and improvements to applicable facilities have been reviewed throughout the design process, and that it has been produced in accordance with this document.*

*NOTE 2 The design team leader signs the review report to confirm that the process has been completed at the appropriate time and that the competency of the Lead Assessor has been reviewed in accordance with Section 3 of this document.*

5.14 The signed review report(s) shall be kept on the highway scheme file.

*NOTE The review report(s) is not forwarded for approval to the Overseeing Organisation.*

## 6. Normative references

The following documents, in whole or in part, are normative references for this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

|         |   |
|---------|---|
| Ref 1.N | Highways England. GG 101, 'Introduction to the Design Manual for Roads and Bridges' |
|---------|---|

## Appendix A. Exemption file note

### A1 Exemption file note

Highway scheme name:

**Table A.1 Highway scheme description**

|  |
|--|
|  |
|--|

#### A1.1 Exemption statement

In accordance with GG 142 walking, cycling and horse-riding assessment and review I have examined the potential presence of pedestrians, cyclists and equestrians within the extents of the highway scheme and any potential user impact outside the scheme extents (as a result of the highway scheme).

For the reasons set out below, this highway scheme is considered exempted from the assessment and review phases of the WCHAR process:

**Table A.2 Reasons for exemption from the assessment and review**

|  |
|--|
|  |
|--|

**Table A.3 Design team leader approval**

|  |  |
|--|--|
| <b>Name of design team leader</b>      |  |
| <b>Job title of design team leader</b> |  |
| <b>Organisation</b>                    |  |
| <b>Signed</b>                          |  |
| <b>Date</b>                            |  |



## Appendix B. Assessment report template

### B1 Background and highway scheme description

#### B1.1 Background

Provide a statement of the Lead Assessor's justification for the highway scheme size (large or small). In addition, provide an explanation of the design stages at which a walking, cycling and horse-riding review will be undertaken and when the associated report(s) will be delivered.

Provide a brief statement about the existing highway layout (if applicable).

#### B1.2 Proposed highway scheme

Provide a brief explanation of the proposed highway scheme and include any specific elements that are intended to improve the existing situation for walking, cycling and horse-riding.

#### B1.3 WCHAR study area

Provide a statement confirming the Lead Assessor's decision about the extent of the WCHAR study area.

Provide a plan to clearly define the WCHAR study area.

### B2 WCHAR assessment

This section summarises the findings of the assessment as set out in Section 4 of GG 142. The findings under each topic area are summarised in an individual table below and any potential opportunities for improvements are noted in each table and then summarised later in sub-section B3. This information does not have to be presented in a tabular format.

**Table B.1 Assessment of walking, cycling & horse-riding policies and strategies**

| <b>Assessment of walking, cycling &amp; horse-riding policies and strategies</b>                                    |
|---|
| Provide a list of the walking, cycling and horse-riding policies and strategies analysed as part of the assessment. |
| Provide a summary of key or relevant points of each policy and strategy.  |

**Table B.2 Collision data**

| <b>Collision data</b>  |
|--|
| Provide details of collision data within the study area that is judged to be relevant to the highway scheme. |
| Provide a summary of the pedestrian, cyclist and equestrian collisions within the study area.                |

**Table B.3 Multi-modal transport services and interchange information**

| <b>Multi-modal transport services and interchange information</b>  |
|--|
| Provide a list of transport services, locations of associated interchanges and service frequencies within the study area.                            |
| Provide details of access to, and facilities at, interchanges that are related to walking, cycling and horse-riding - e.g. cycle parking facilities. |

**Table B.4 Trip generators**

|   |
|---|
| <b>Trip generators</b>  |
| Provide a list of trip generators within the study area that may influence levels of walking, cycling and horse-riding and the associated desire lines. |
| Provide a plan of the key trip generators (this does not have to be all trip generators within the study area).   |

**Table B.5 Site visit**

|  |
|--|
| <b>Site visit</b>  |
| Provide details of the site visit carried out as part of the assessment - attendees, times, dates and facilities visited.            |
| Provide a summary of the site visit findings including the standard and condition of existing facilities where appropriate/relevant. |

**Table B.6 Liaison with key stakeholders**

|  |
|--|
| <b>Liaison with key stakeholders</b>   |
| Provide details of liaison with key stakeholders - including organisation details of those contacted.                                  |
| Provide a summary of stakeholder discussions. e.g. agreed meeting minutes or opportunities of interest identified by each stakeholder. |

**Table B.7 Existing pedestrian, cyclist and equestrian facilities**

|   |
|---|
| <b>Existing pedestrian, cyclist and equestrian facilities</b>   |
| Provide a plan of the existing facilities within the WCHAR study area.  |
| Provide a summary assessment of the condition of the key existing facilities for walking, cycling and horse-riding (this does not have to be exhaustive and will mostly be informed by the site visit). |
| For large highway schemes - provide a summary assessment of the strategic networks.   |

**Table B.8 Liaison with local user groups and wider public**

|  |
|--|
| <b>Liaison with local user groups and wider public</b>   |
| Provide details of liaison with local user groups and the wider public - including organisation details of those contacted.  |
| Provide a summary of discussions. e.g. agreed meeting minutes, or opportunities of interest identified by each stakeholder, details of exhibitions held and feedback received. |

**B3 User opportunities**

The opportunities highlighted below are deemed to be relevant to the highway scheme and should be considered by the design team leader throughout the progression of the highway scheme design in addition to any further opportunities that may arise through the ongoing development of the design phase(s).

**Table B.9 Identified user opportunities**

|  |
|--|
| <b>General</b>   |
| Provide details of identified opportunities that are general to the highway scheme and user type - this could include opportunities for matched funding projects with key stakeholders.  |
| <b>Strategic opportunities</b>   |
| Provide details of identified opportunities that are strategic in nature - such as completion of missing links that would benefit the wider strategic user networks such as the National Cycle Network and the public rights of way network.   |
| <b>Pedestrian specific opportunities</b>   |
| Provide details of identified opportunities that would benefit pedestrians within the study area.<br><br>Examples:<br>This could include new facilities or improvements to footways, footpaths and upgraded pedestrian crossings.  |
| <b>Cyclist specific opportunities</b>  |
| Provide details of identified opportunities that would benefit cyclists within the study area.<br><br>Examples:<br>This could include improvements to on and off-carriageway cycle routes, upgrading of footways to shared use paths and upgrading existing crossings to provide for cyclists.<br>This could also include associated infrastructure such as cycle parking. |
| <b>Equestrian specific opportunities</b>   |
| Provide details of identified opportunities that would benefit equestrians within the study area.<br><br>Examples:<br>This could include improvements to bridleways, upgraded crossings to better provide for equestrians and improvements to existing shared use facilities to accommodate equestrian use.  |

**B4 Walking, cycling and horse-riding assessment team statement**

As Lead Assessor, I confirm that this walking, cycling and horse-riding assessment report has been compiled in accordance with DMRB GG 142. The walking, cycling and horse-riding assessment was undertaken by the following assessment and review team:

**Table B.10 Walking, cycling and horse-riding Lead Assessor**

|                     |                               |
|---------------------|-------------------------------|
| <b>Name</b>         | Name of Lead Assessor         |
| <b>Position</b>     | Job title of Lead Assessor    |
| <b>Organisation</b> | Organisation of Lead Assessor |
| <b>Signed</b>       |                               |
| <b>Date</b>         |                               |

**Table B.11 Walking, cycling and horse-riding assessor (where appointed)**

|                     |                          |
|---------------------|--------------------------|
| <b>Name</b>         | Name of assessor         |
| <b>Position</b>     | Job title of assessor    |
| <b>Organisation</b> | Organisation of assessor |

As the design team leader, I confirm that the assessment has been undertaken at the appropriate stage of the highway scheme development.

I confirm that in my professional opinion the appointed Lead Assessor has the appropriate experience for the role making reference to the expected competencies contained in GG 142.

**Table B.12 Design team leader**

|                     |                                    |
|---------------------|------------------------------------|
| <b>Name</b>         | Name of design team leader         |
| <b>Position</b>     | Job title of design team leader    |
| <b>Organisation</b> | Organisation of design team leader |
| <b>Signed</b>       |                                    |
| <b>Date</b>         |                                    |

## Appendix C. Review report template

### **C1 Background and highway scheme description**

#### **C1.1 Background**

Provide a statement to confirm that the size of the highway scheme (large or small) judged at the assessment stage is still correct or note any change in scheme size. Provide details of any completed or planned future walking, cycling and horse-riding review(s).

Provide a brief statement about the existing highway layout (where applicable).

#### **C1.2 Proposed highway scheme**

Provide a brief explanation of the proposed highway scheme and include any specific elements that are intended to improve the situation for walking, cycling and horse-riding.

#### **C1.3 Review team**

Provide details of the walking, cycling and horse-riding review team and note any changes that may have occurred since the preceding assessment or review.

#### **C1.4 WCHAR study area**

Provide a statement confirming the Lead Assessor's decision about the extent of the WCHAR study area.

Provide a plan to clearly show the WCHAR study area.

### **C2 Review of walking, cycling and horse-riding assessment opportunities**

This section provides a summary of the opportunities identified as part of the assessment report and the actions taken or outcomes related to these during the preliminary design phase of the highway scheme. They are provided verbatim from the review report issued at the end of the preliminary design phase of the highway scheme.

**Table C.1 Opportunities identified during the assessment**

|   |
|---|
| <b>General opportunities</b>                                    |
| Provide details of each opportunity from the assessment report. |
| Provide the actions taken to address each opportunity.          |
| <b>Strategic opportunities</b>                                  |
| Provide details of each opportunity from the assessment report. |
| Provide the actions taken to address each opportunity.          |
| <b>Pedestrian specific opportunities</b>                        |
| Provide details of each opportunity from the assessment report. |
| Provide the actions taken to address each opportunity.          |
| <b>Cyclist specific opportunities</b>                           |
| Provide details of each opportunity from the assessment report. |
| Provide the actions taken to address each opportunity.          |
| <b>Equestrian specific opportunities</b>                        |
| Provide details of each opportunity from the assessment report. |
| Provide the actions taken to address each opportunity.          |

### **C3 Preliminary design stage walking, cycling and horse-riding review opportunities (for large highway schemes)**

This section documents any user related opportunities identified during the preliminary design phase (after the assessment report has been issued). They have been developed through discussions between the Lead Assessor and the wider design team and recorded here (along with actions taken / outcomes).

**Table C.2 Opportunities identified during the preliminary design phase**

|   |
|---|
| <b>General opportunities</b>  |
| Provide details of each opportunity identified in the preliminary design phase. |
| Provide the actions taken to address each opportunity.                          |
| <b>Strategic opportunities</b>  |
| Provide details of each opportunity identified in the preliminary design phase. |
| Provide the actions taken to address each opportunity.                          |
| <b>Pedestrian specific opportunities</b>  |
| Provide details of each opportunity identified in the preliminary design phase. |
| Provide the actions taken to address each opportunity.                          |
| <b>Cyclist specific opportunities</b>   |
| Provide details of each opportunity identified in the preliminary design phase. |
| Provide the actions taken to address each opportunity.                          |
| <b>Equestrian specific opportunities</b>  |
| Provide details of each opportunity identified in the preliminary design phase. |
| Provide the actions taken to address each opportunity.                          |

**C4 Detailed design stage walking, cycling and horse-riding review**

This section records any user-related opportunities identified during the detailed design phase (after the assessment report and preliminary design phase review report, where applicable, has been issued). They have been developed through discussions between the Lead Assessor and the wider design team and recorded here (along with actions taken / outcomes).

For small highway schemes, record decisions made during the entire design phase here without reference to a previous review report unless one has been produced.

It also includes new opportunities for improvement identified as a result of the developing design.

**Table C.3 Opportunities identified during the detailed design phase**

|  |
|--|
| <b>General opportunities</b>   |
| Provide details of each opportunity identified in the detailed design phase. |
| Provide the actions taken to address each opportunity.                       |
| <b>Strategic opportunities</b>   |
| Provide details of each opportunity identified in the detailed design phase. |
| Provide the actions taken to address each opportunity.                       |
| <b>Pedestrian specific opportunities</b>                                     |
| Provide details of each opportunity identified in the detailed design phase. |
| Provide the actions taken to address each opportunity.                       |
| <b>Cyclist specific opportunities</b>  |
| Provide details of each opportunity identified in the detailed design phase. |
| Provide the actions taken to address each opportunity.                       |
| <b>Equestrian specific opportunities</b>                                     |
| Provide details of each opportunity identified in the detailed design phase. |
| Provide the actions taken to address each opportunity.                       |

**C5 Walking, cycling and horse-riding review team statement**

As Lead Assessor, I confirm that this walking, cycling and horse-riding review report has been compiled in accordance with DMRB GG 142 and thus records all design team deliberations and decisions relating to walking, cycling and horse-riding issues and opportunities.

The walking, cycling and horse-riding review was undertaken by the following team:

**Table C.4 Walking, cycling and horse-riding Lead Assessor**

|                     |                               |
|---------------------|-------------------------------|
| <b>Name</b>         | Name of Lead Assessor         |
| <b>Position</b>     | Job title of Lead Assessor    |
| <b>Organisation</b> | Organisation of Lead assessor |
| <b>Signed</b>       |                               |
| <b>Date</b>         |                               |

**Table C.5 Walking, cycling and horse-riding assessor (where appointed)**

|                     |                          |
|---------------------|--------------------------|
| <b>Name</b>         | Name of assessor         |
| <b>Position</b>     | Job title of assessor    |
| <b>Organisation</b> | Organisation of assessor |

As design team leader, I confirm that the assessment has been undertaken at the appropriate stage of the highway scheme development.

I confirm that in my professional opinion the appointed Lead Assessor has the appropriate experience for the role making reference to the expected competencies contained in DMRB GG 142.



**Table C.6 Design team leader**

|                     |                                    |
|---------------------|------------------------------------|
| <b>Name</b>         | Name of design team leader         |
| <b>Position</b>     | Job title of design team leader    |
| <b>Organisation</b> | Organisation of design team leader |
| <b>Signed</b>       |                                    |
| <b>Date</b>         |                                    |

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