



Hampshire
County Council

Economy, Transport and Environment Department

Technical Guidance Note TG19 – Walking, Cycling and Horse- Riding Assessment and Review (WCHAR)

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CONTENTS

1. Introduction	3
2. Policy / Approach	5
3. Definitions & Abbreviations.....	6
4. Process	7
4.1. Walking, Cycling and Horse-Riding Assessment.....	7
4.2. Walking, Cycling and Horse-Riding Review	9
4.3. Independence of the WCHAR Assessment and Review Team.....	9
5. Reference Documents.....	10
6. Further Support	11
Appendix A – Templates	12

1. Introduction

- 1.1. This Technical Guidance Note describes the process for undertaking a Walking, Cycling and Horse-Riding Assessment and Review (WCHAR). This shall be used to consider the needs of people walking, cycling or riding horses within the design of all highway improvement schemes (see 4.1.4).
- 1.2. The objective of the guidance is to help create conditions which make walking and cycling more attractive and a preferred choice of travel. Similarly, the guidance seeks to enhance and create improved conditions for horse-riding.
- 1.3. The Assessment is the first stage of the process and should be carried out during the initial stages of planning a scheme, to investigate the existing infrastructure and identify potential opportunities to improve conditions for people walking, cycling and where appropriate, riding horses. This shall include the needs of all potential users such as people using mobility aids, prams/buggies and the range of cycles available. It is important to identify these issues at an early stage as this will help the Design Team to achieve the best possible outcome for these users.
- 1.4. The complexity of the Assessment will depend on the size and type of scheme, but it need not be an excessively time-consuming task, particularly for small schemes. The objective is to ensure that the Design Team has sufficient information to allow them to fully consider the interests of people walking, cycling or riding horses within the scheme design, be they existing users or potential users that may choose to use the route as a result of the scheme.
- 1.5. The practical application of this guidance should be in line with the financial thresholds set out in paragraph 4.1.4. In addition, this guidance should be applied proportionately to ensure benefits for the residents, business, and visitors to Hampshire are delivered inclusively. The assessment should consider location, impact and scale alongside financial thresholds.
- 1.6. In order to get a full picture of the current and potential activity and assess the impact of a scheme, it is important to collect and analyse a variety of background data. The level of information required should reflect the size and nature of the scheme. It is also essential for the assessment team to visit the locality at different times of the day to view the current patterns of pedestrian, cycle and equestrian movement.
- 1.7. Useful background information may include:
 - Vehicles flows and speeds
 - Cycle and pedestrian flows
 - Existing and expected desire lines
 - Carriageway and footway widths
 - Rights of Way
 - Casualty data

- Highway boundaries
 - Trip generators
 - Relevant strategies and studies (Local Cycling and Walking Infrastructure Plans, Cycle Strategies, School/Development Travel Plans, Accessibility Studies, Land Development Frameworks, Propensity to Cycle Tool)
 - Existing audits including Cycling Level of Service and Junction Assessment Tool Audits
- 1.8. In addition to this information, early consultation with key stakeholders is essential as this may provide valuable local knowledge and ensure that the scheme meets the needs of the intended users.
- 1.9. The output of the Assessment shall be an Assessment Report, which should be completed **before** commencement of the preliminary design. This report will identify a list of potential opportunities to improve conditions for people walking / cycling and equestrians and attract an increased number of users.
- 1.10. The second part of the process is an ongoing review of the Assessment Report throughout the design process, to ensure that all identified opportunities have been given due consideration and incorporated into the scheme where feasible. The review should also identify new opportunities for improvement that may arise during the scheme design that were not evident during the Assessment phase. All design decisions relating to the provision of walking, cycling and horse-riding facilities should be recorded in the Review Report.

2. Policy / Approach

- 2.1. The Design Manual for Roads and Bridges General Principles document GG 142 sets out the procedure for undertaking a Walking, Cycling and Horse-Riding Assessment and Review.
- 2.2. Hampshire County Council (HCC) has adopted GG 142 as the method for assessing walking, cycling and horse-riding service provision for local highway schemes within Hampshire subject to the adjustments as detailed in this Technical Guidance Note.
- 2.3. For HCC promoted schemes, the responsibility for carrying out the Assessment Stage will be with the Scheme Client, rather than the Design Team as it needs to be undertaken in advance of the design and outcomes/recommendations incorporated into the project brief and initial scheme funding. The Assessment Report is to be provided to the Design Team with the scheme brief, who will then carry out the Review Stage through the preliminary and detailed design phases.
- 2.4. For Developer-led schemes the Assessment Stage shall be carried by the Developer's Consultant at the early concept pre-planning stage. It is essential that the assessment is undertaken early to ensure that appropriate provision is included at the planning application stage. Both the Assessment and Review Reports are to be submitted as part of the S278/S38 submission. Where the scheme is deemed exempt from the WCHAR process the HCC approved exemption shall be included with the S278/S38 submission - see paragraph 4.1.5).

Developers/Consultants should note the following:

- The content of the WCHAR Assessment and Review is very similar to the requirements for Design and Access Statements required for Planning. The WCHAR process can be used to help formulate the Design and Access Statement for the development.
- The WCHAR assessment may be requested by the Highway Authority for review at the planning stage e.g. to ensure routes to wider community facilities have been fully considered.
- For multi-phase developments, including those being delivered by consortiums, it is recommended that a the WCHAR process is used at the overarching stage, assessing the whole development. This can then be reviewed by the design teams responsible for each of the development phases.

3. Definitions & Abbreviations

Assessor	A practitioner who is appointed to assist the Lead Assessor. NOTE: More than one assessor can be appointed by the Lead Assessor.
Design Organisation	The organisation commissioned to undertake the various phases of scheme preparation. This may be HCC teams, a Term Consultant, a District Council or a Developer's Consultant.
Design Team	The group within the Design Organisation undertaking the scheme preparation.
HCC	Hampshire County Council
Lead Assessor	The designated and competent practitioner who is responsible for the completion of the WCHAR process in accordance with this TG and GG 142. For HCC led schemes, this will normally be someone within or appointed by the Scheme Client.
Scheme Client	The Client for the scheme within Hampshire County Council (for HCC led schemes only)
S278	Section 278 of the Highways Act 1980
S38	Section 38 of the Highways Act 1980
WCHAR	Walking, Cycling and Horse-riding Assessment and Review
WCHAR Assessment	The first part of the WCHAR process. NOTE: Also referred to as 'the assessment' within this document.
WCHAR Review	The second and final part of the WCHAR process. NOTE: Also referred to as 'the review(s)' within this document.

4. Process

4.1. Walking, Cycling and Horse-Riding Assessment

- 4.1.1. The Walking, Cycling and Horse-Riding Assessment shall be carried out in accordance with GG 142 Section 4 by the appointed Lead Assessor. The Lead Assessor shall have sufficient knowledge and experience to manage and complete the process (refer to Table 3.1.1. of GG 142 for the expected competencies of a Lead Assessor). Additional Assessors may be appointed to assist the Lead Assessor.
- 4.1.2. For HCC promoted schemes the WCHAR Assessment is to be carried out by the Scheme Client team and be provided to the Design Team with the design brief.
- 4.1.3. For Developer-led schemes the Assessment Stage is to be carried out by the Developer's Consultant at the beginning of the concept/pre-application stage.
- 4.1.4. The following table provides a guide of "Large" and "Small" schemes within Hampshire. The process detailed in GG 142 for Large and Small schemes shall be followed with the Lead Assessor confirming the scale of the scheme within the Assessment Report.

Scheme Description	Exempt	Small Scheme	Large Scheme
HCC Community Funded Initiative Traffic Management Schemes	✓		
HCC Routine and Reactive Maintenance	✓		
HCC Capital Funded Maintenance Schemes	✓		
HCC Safety Engineering Schemes	✓		
HCC Capital Funded Minor Works Improvement Schemes (<£70k)	✓		
HCC Capital Improvement Schemes / Community Funded Highway Infrastructure Schemes <£500k		✓	
HCC Capital Improvement Schemes / Community Funded Highway Infrastructure Schemes >£500k			✓
HCC Capital Improvement Schemes >£2m			✓
S38/S278 schemes with 50 or less residential units		✓	
S38/S278 schemes comprising more than of 50 residential units			✓
S38/S278 schemes which include retail/industrial units or community facilities such as schools, community centres or local surgery			✓
S278 schemes remote from the associated development site (unless covered within the WCHAR for the development site)		✓	

- 4.1.5. For schemes which are not automatically exempt (as indicated in the table above) but have no impact on people walking, cycling or horse riding the Scheme Client shall record this decision on the project file using the template provided in Appendix A. This shall also be detailed in the project brief to the Design Team.
- 4.1.6. For Developer-led schemes, exemption from the WCHAR process will only be confirmed by the Development Planning Team at HCC – The Developer’s Consultant should submit sufficient information and justification for the exemption at the scheme concept stage, using the template provided in Appendix A, to highways.development.control@hants.gov.uk and if approved, include the Development Planning confirmation of exemption within the S278/S38 submission package.
- 4.1.7. The output of the Assessment shall comprise an Assessment Report which shall be completed before commencement of the preliminary design in order to feed into any scheme funding decisions/bidding process. The

format for the Assessment Report shall be in accordance with the template provided in Appendix A.

4.2. Walking, Cycling and Horse-Riding Review

- 4.2.1. The Walking, Cycling and Horse-Riding Review shall be carried out in accordance with GG 142 Section 5.
- 4.2.2. The Design Team shall carry out an ongoing review of the Assessment Report during the design process and record the design decisions relating to the provision for people walking, cycling and equestrians in a Review Report, liaising with the Lead Assessor where required. The completed WCHAR Review Report shall be issued to the Lead Assessor for approval.
- 4.2.3. The Design Team should also identify new opportunities for improvements that may arise during the design process that may not have been evident during the initial assessment.
- 4.2.4. For Developer-led schemes the review stage shall be undertaken by the Developer's Consultant.
- 4.2.5. For Large Schemes, a Review Report shall be produced at the end of the preliminary design stage and before commencement of detailed design, followed by a further Review Report at the end of the detailed design phase. For Small Schemes, a Review Report is only required at the end of the detailed design phase. The format for the Review Report should be in accordance with the template provided in Appendix A.

4.3. Independence of the WCHAR Assessment and Review Team

- 4.3.1. Members of the WCHAR Assessment and Review Team shall not be permitted to be members of the Road Safety Audit Team for the same scheme, in order to maintain the independence of the Road Safety Audit Team. The Lead Assessor shall be permitted to seek guidance from the Road Safety Audit Team about road safety matters but this should be documented within the Assessment and/or Review Reports (GG 142 Para 3.4).

5. Reference Documents

- 5.1. The following documents provide useful information and guidance on the requirements for people walking, cycling and riding horses.

DfT Local Transport Note 1/20 – Cycle Infrastructure Design

DfT Inclusive Mobility

Advice on Specifications and Standards recommended for equestrian routes in England and Wales (British Horse Society)

A Guide for Inclusive Cycling (Wheels for Wellbeing)

Designing for Walking (CIHT)

Manual for Streets

Manual for Streets 2

- 5.2. In addition to these documents there is some useful guidance contained within the following sections of the Design Manual for Roads & Bridges.

CD 143 Designing for walking, cycling and horse-riding

CD 195 Designing for cycle traffic

CD 239 Footway and cycleway pavement design

6. Further Support

- 6.1. Should you have a specific query or feedback about any of the content of this Technical Guidance Note, please send an email to Technical.Guidance@hants.gov.uk with the start of the email title as “TG19 – “.
- 6.2. Should you have a query about applying this to your particular project, please contact:
- the Design Audit Engineer dealing with your S278 or S38 application (if you are a Developer or Developer’s Consultant)
 - the Technical Guidance Note Specialist(s) (if you are a working within Hampshire County Council)

Appendix A – Templates

Links to Templates for HCC Schemes

[WCHAR Exemption Report Template](#)

[WCHAR Assessment Report Template](#)

[WCHAR Review Report Template](#)

Links to Templates for Developer-Led Schemes

[WCHAR Exemption Report Template](#)

[WCHAR Assessment Report Template](#)

[WCHAR Review Report Template](#)